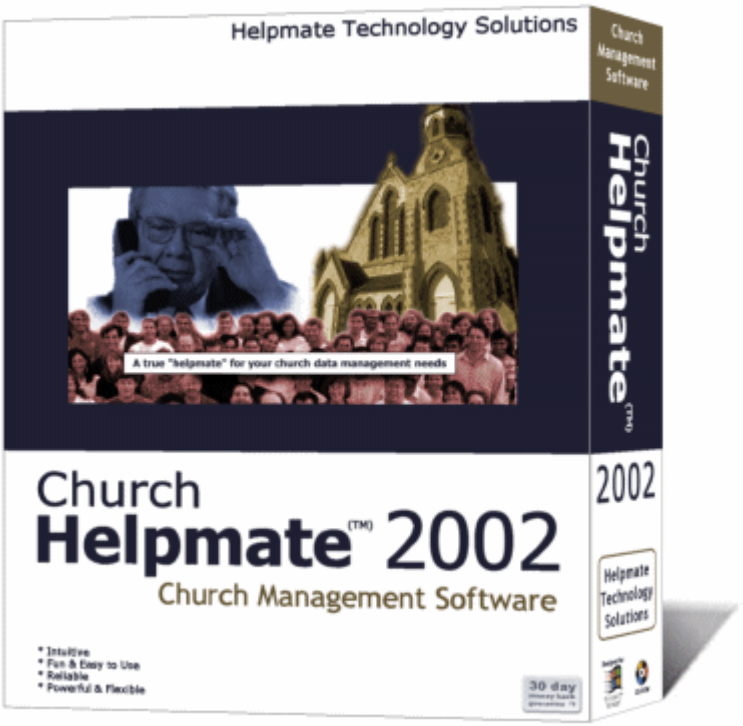


Church Helpmate 2002 User's Manual

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Church Helpmate 2002 User's Manual

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by Helpmate Technology Solutions

Revision Oct 05, 2002

Church Helpmate 2002

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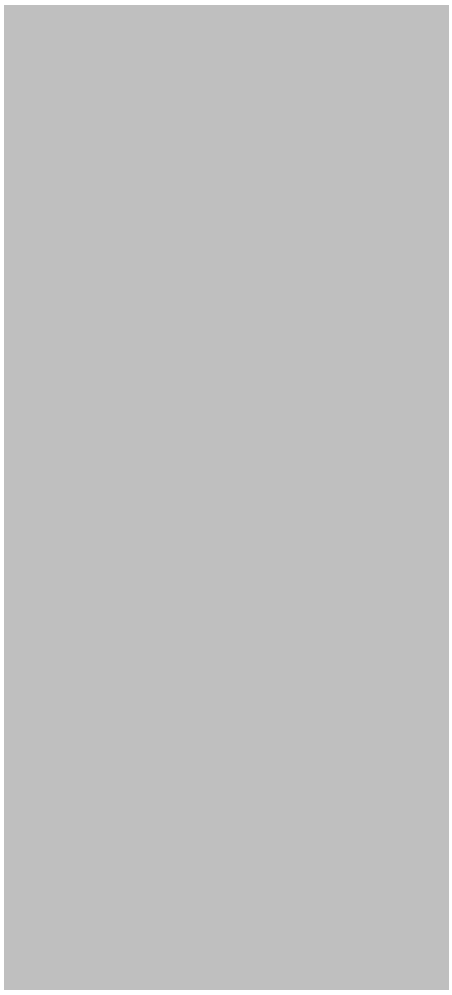


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Chapter 1

1 Chapter 1 - Introduction

1.1 Chapter 1 - Introduction



Welcome to **Church Helpmate™ 2002**, a powerful 32-bit church management software application for Microsoft Windows. Whether you are an experienced user of Church Helpmate™ or a new user evaluating this application for use in your ministry, your support and interest is greatly appreciated.

Our honest prayer, is that Church Helpmate™ 2002 will truly be a "helpmate" for your ministry - thus allowing you to spend more time ministering to your congregation and spreading the saving knowledge of Jesus Christ to all nations. It is our desire (through our products and services) to help you and your church be as effective and efficient as possible.

Your input and comments of this application are encouraged and appreciated. Please let us know how this application has helped you and your ministry - and how it could be improved to better serve you. Please, send us your ideas and we'll do our best to implement them into the standard application.

Below are some of the highlights that Church Helpmate™ 2002 will enable you and your church to do:

- Record, manage, and report your membership records
- Record, manage, and report various group activities within your church
- Manage your mailing lists
- Record, receipt, and report your contribution records (including remote entry and reporting capabilities)
- Record, receipt, and report contribution pledges
- Generate directories (including photo directories)
- Manage important contact information on various vendors, contributors, and others not part of your formal membership
- Record, track, and report attendance in classes, group meetings, and worship services
- Record, track, and report your visitation program
- Remind you of one-time or recurring tasks
- Allow you to communicate more effectively with your congregation via postal mail, phone, and the Internet.

Chapter 1 Sections:

Helpmate Technology Solutions
License Agreement (EULA)
Products Requirements
Installation
Licensing, Ordering & Registration
Technical Support

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1.2 Helpmate Technology Solutions

(Chapter 1 - Introduction)

Company History & Overview

Helpmate Technology Solutions (HTS) is a privately owned software manufacturing company created in 1996 by its President, Paul Schuster. Since its inception, the sole focus of the company has been to design, develop, market, and support the world's finest in church management software.

IN THE BEGINNING

During the summer of 1996, Paul Schuster (HTS President) was presented with an opportunity from the associate pastor of his local church (*Fellowship of Believers* – http://www.fobky.com) to design and build a membership database system for them. This system would encompass membership, group/ministry activity and participation, contribution and pledge tracking, and attendance tracking. At the time, the church was rapidly growing. They had been using a commercial church management software (CMS) program, but the staff was running into some real "headaches" and limitations with this system. Thus Helpmate Technology Solutions was originally created to meet the need of a local body of believers. By the end of 1996, Paul's local church was "up and running" on the very first version of the Helpmate™ church management software system.

In early 1997, HTS began marketing the Helpmate™ CMS product exclusively through the HTS Internet website. Churches from across the nation, as well as worldwide, began discovering the quality church management software and the related services that HTS has to offer. Since that time, the Helpmate™ church management product line has been continually developed and supported through the years and is now being utilized by hundreds of churches and non-profit organizations.

MISSION STATEMENT

Helpmate Technology Solutions' Mission is to provide innovative, premium-quality software solutions for our church and non-profit clients worldwide. Our sole passion, purpose, and objective is to increase the efficiency and effectiveness of our clients. To this end, we strive and commit to:

- Becoming a leader in the church management software industry
- Treating our customers with respect and thankfulness at all times
- Staying abreast of the current and latest technology trends and tools
- Focusing on 100% customer satisfaction in our products, services, and support
- Being open and responsive to all customer feedback and suggestions

MANAGEMENT TEAM

HTS is led by its founder and President, **Paul Schuster**. Paul received his Bachelor's Degree in Electrical Engineering in 1993 from the University of Cincinnati. As both a Christian and a technology expert, Paul's passion is in developing and integrating technology solutions into today's demanding church and non-profit office. "Empowering churches with technology" is how Paul describes his motivation. Paul oversees all facets of the company, but his main focus is on the software development and support aspects. Paul resides in Northern Kentucky with his wife, Cornelia and their four children: Gabrielle, Austin, Isaac, and Tierney.

CLIENT BASE

HTS' client base includes hundreds of churches and non-profit organizations. This client base is dispersed throughout the nation (in 47 U.S. states) and worldwide as well (in 14 countries). The company's church clients represent more than 20 different church denominations and range in membership size from 40 to 7,000 individuals. Each year since the company's inception in 1996, the company's gross revenue has approximately doubled every year. This growth is testimony to the

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quality products and services that HTS is providing to today's churches and non-profit organizations.

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1.3 License Agreement

(Chapter 1 - Introduction)

END USER LICENSE AGREEMENT (EULA) and Limited Warranty
Church Helpmate™ 2002 - Helpmate Technology Solutions (HTS)

IMPORTANT INFORMATION -- Please Read

Do NOT use the SOFTWARE (which term includes the product documentation) until you have carefully read this Agreement, which provides the terms and conditions for its use. Installing the SOFTWARE indicates that you have read, understand and accept this Agreement. If you do not accept this Agreement, return it with the original receipt or invoice to:

Helpmate Technology Solutions
Attn: Returns
PO Box 619
Union, KY 41091 USA

PERMITTED USE AND RESTRICTIONS ON USE

The SOFTWARE is "licensed" to the end-user, not sold. Upon purchasing the SOFTWARE, you are granted a personal, non-exclusive license to:

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Helpmate Technology Solutions
Attn: Returns
PO Box 619
Union, KY 41091 USA

LIMITED WARRANTY

If the supplied SOFTWARE disks or CD are defective, please return the SOFTWARE to:

Helpmate Technology Solutions
Attn: Returns
PO Box 619
Union, KY 41091 USA

within 30 days of purchase and replacement disks and or CD will be mailed to you.

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The limitations of damages or liability set forth in this Agreement are fundamental elements of the basis of the bargain between HTS and you. You acknowledge and agree that HTS would not be able to provide this product on an economic

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basis without such limitations.

MISCELLANEOUS

This Agreement sets forth HTS's and its representatives' entire liability and your exclusive remedy with respect to the SOFTWARE and related services, and is a complete statement of the agreement between you and HTS. Headings are included for convenience only, and shall not be considered in interpreting this Agreement. This Agreement does not limit any rights that HTS may have under trade secret, copyright, patent or other laws. The agents, employees, distributors, or dealers of HTS are not authorized to make modifications to this Agreement, or to make any additional representations, commitments, or warranties binding on HTS. If any provision of this Agreement is invalid or unenforceable under applicable law, then it shall be, to that extent, deemed omitted and the remaining provisions will continue in full force and effect. The validity and performance of this Agreement shall be governed by Kentucky law (without reference to choice of law principles), and applicable federal law. This Agreement is deemed entered into at Union, Kentucky (U.S.A), and shall be construed as to its fair meaning and not strictly for or against either party.
This agreement supercedes any previous version of this Agreement included in HTS's printed documentation.

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1.4 Product Requirements

(Chapter 1 - Introduction)

Minimum Requirements

- IBM compatible PC running Windows 95 or newer (including Win98/NT/Me/2000/XP)
- 16MB RAM
- Super VGA monitor running 256 colors at 800x600 resolution
- CD ROM drive (for installation)
- 45MB disk space for initial installation. Additional storage space should be allocated for your data files at the rate of approximately 5MB per year.
- Mouse or equivalent pointing device

Recommended Requirements

- Pentium 500MHz or better PC running Windows 98 or newer
- 96MB RAM or more
- Super VGA monitor running at "High Color" at 800x600 resolution or better
- CD ROM drive (for installation)
- 45MB disk space for initial installation. Additional storage space should be allocated for your data files at the rate of approximately 5MB per year.
- Mouse or equivalent pointing device

Optional Requirements

- Internet connectivity and Internet Service Provider (ISP) for Email and World Wide Web browsing capabilities
- Network interface cards, hubs, routers, etc. for sharing of the Church Helpmate™ 2002 data file in a network/multi-user environment. Recommended network speed is 100Mbs or higher.
- Modem and phone service for Auto-Dial capabilities
- Windows compatible printer for printing reports
- Windows compatible scanner for importing Individual, Household, and Contact photographs
- Microsoft® Word 97 or newer for built-in automatic mail merge capabilities. Note: Other word processors can be used to manually perform mail merges with the CH2002 export data.
- Sound card and speakers for the Audio Feedback capabilities
- Tape Backup, CD-writer, "Zip-Drive" or other similar device for archiving application and data files
- QuickBooks 6.0 or later for CH2002 contribution interfacing capabilities
- Palm Pilot Personal or later, cradle with PC interface, Palm Desktop Software, and version 3.0 or later of the Palm Hotsync Manager for the CH2002 Palm Pilot Export Utility

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1.5 Installation

(Chapter 1 - Introduction)

The Church Helpmate™ 2002 product utilizes a standard Windows install/uninstall process.

Installation Instructions:

1. With the Windows operating system running, close all unnecessary applications.
2. Insert the Church Helpmate™ 2002 CD into your computer's CD drive.
3. The HTS CD menu will be displayed after a brief delay. From this main menu, choose the "Full Install" option for Church Helpmate™ 2002
4. Follow the on-screen instructions to complete the installation.

NOTE: If the HTS CD menu is not displayed automatically upon inserting the CD into your computer's CD drive, you can initiate it manually by the following steps:

1. Click the Windows Start button, then select Run
2. At the "Open" command line, type the following (without quotation marks): "*x:\autorun\autorun.exe*" (where "x" represents the drive letter of your computer's CD drive).

Un-Installation Instructions:

1. With the Windows operating system running, close all unnecessary applications (including the CH2002 application).
2. Select the following from the Windows "Start" button:
   "Start | Programs | Church Helpmate 2002 | Uninstall"
3. Follow the on-screen instructions on uninstalling the product.

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1.6 Licensing, Ordering, & Registration

(Chapter 1 - Introduction)

LICENSING

Like most other software applications, the Church Helpmate 2002 product is licensed - not sold. This means that (aside from evaluation purposes) users must purchase and obtain a license to use the product. There are 5 available license levels for the CH2002 product. These are:

1. **"Level 1" - CH2002/100**
   This license level provides storage capacity of up to 100 Household records and 100 Contact records.

2. **"Level 2" - CH2002/300**
   This license level provides storage capacity of up to 300 Household records and 300 Contact records.

3. **"Level 3" - CH2002/600**
   This license level provides storage capacity of up to 600 Household records and 600 Contact records.

4. **"Level 4" - CH2002**
   This license level provides unlimited storage capacity.

5. **"*DEMO / EVALUATION*"**
   This license permits you to use the application for a reasonable period of time for evaluation purposes. To continue using the application beyond a reasonable evaluation period, one of the other licenses listed above is required. This license is available at no cost (other than applicable shipping & handling charges). This license has record limitations of 15 Household records, 40 Individual records, and 15 Contact records.

NOTE: License levels 1-4 above are full "site" license (multi-user/network) levels allowing unlimited usage within the organization's site including any staff/volunteer's home/personal computers.

NOTE: License levels can easily be upgraded through a simple registration process.

EVALUATION / ORDERING / REGISTRATION PROCESS

The evaluation, ordering, and registration process for the Church Helpmate 2000 product is somewhat unique (and we believe superior) to most other software applications. This process is outlined below:

1. **Obtaining the CH2002 CD**
   Typically, this is the first step in the process. You can obtain the full CH2002 product on CD for no cost (for shipments outside U.S. and Canada a small shipping & handling fee may apply). You can submit a request to be sent this CD through the Helpmate Technology Solutions' web site (www.helpmate.net) or by calling HTS at 888-858-3247 (toll-free) (859-384-7564 for International calls).

2. **Evaluating the CH2002 Product**
   Once the you've obtained the CH2002 CD, you may install and run CH2002 for evaluation purposes. Initially the you have a "DEMO / EVALUATION" license as described in the previous section. The CH2002 product will initially operate in a "demo" mode. While in demo mode, CH2002 will restrict record input to 15 Household records, 40 Individual records, and 15 Contact records. All other aspects of the product are fully functional in demo mode.

3. **Placing Your Order**
   Once you have decided to continue to use the CH2002 product for use in your ministry, your "DEMO / EVALUATION" license expires and you are required to obtain one of the other licenses (as described in the previous section). This license must be purchased. You may place your order for CH2002 by any of the following methods:

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- PHONE: 888-858-3247 (toll-free) (859-384-7564 for International calls)
- INTERNET: www.helpmate.net (we provide a secure order processing system)
- FAX: 859-384-1950 (call our sales phone line or visit the HTS website to obtain an order form)
- POSTAL MAIL: PO BOX 619, Union KY 41091 USA (call our sales phone line or visit the HTS website to obtain an order form)

Payments can be made by check, money order, cash, or credit card (MasterCard, VISA, Discover, or American Express).

4. Registering Your Copy of CH2002

After HTS receives and fulfills your order, you'll receive a "User Name" and "Registration Code". With these 2 items, you can now "register" and unlock your copy of CH2002. To do so, start the CH2002 product and click on the "Enter Registration Info" button displayed on the initial startup splash screen. Doing so will open the Registration Entry Form (you can also open this form by selecting "Help | Register" from the CH2002 top main menubar). You will need to type in your User Name and Registration Code. Upon successful entry, CH2002 will become "licensed" (registered). The application will know which of the 4 licenses ("Level 1", "Level 2", "Level 3", or "Level 4") you have purchased and registered for by the Registration Code entered. The product will then disable its demo mode and operate according to the license registered (see previous section for description of the available licenses).

At any time, you can view your license information/status by selecting "Help | About" from the CH2002 top main menubar.

NOTE: Items 1-2 above are optional. If you wish, you can certainly place your order for CH2002 without first obtaining the CD and evaluating the product. You always have protection of our full money-back guarantee for 30 days after your purchase.

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1.7 Technical Support

(Chapter 1 - Introduction)

Before you contact us for technical support, please...

- Refer to the Online Help, the CH2002 User's Manual, and the README.txt file supplied with the software for possible solutions.
- Refer to the Helpmate Technology Solutions' website (www.helpmate.net) for latest bug reports, service releases (Build releases), frequently asked questions (FAQ), and technical support articles (TSA's).

At HTS, our mission is to develop a positive, lasting relationship with our clients. We don't want to simply sell software to our clients; we want to grow with them as a business partner. By offering our Support Services, we can maintain such a relationship through the finest in support, training and product development. We are committed to our clients' long-term success. This commitment not only drives the research and development behind our church management software products, but is also the motivation for the quality technical support services we offer. Our first priority - and measure of our success - is client satisfaction.

To address a wide range of technical support needs and user skill levels, HTS offers a "tiered" support plan that allows our clients to select a plan that best meets their requirements:

"Preferred Support Plan" – full software maintenance and unlimited technical support coverage

- Unlimited telephone support (available M-F 9:30am-5pm EST)
- Priority support email address (via an unpublished email address dedicated to plan subscribers)
- No-cost maintenance updates (service releases) delivered via postal mail on CD
- No-cost full version upgrades delivered via postal mail on CD
- HTS quarterly newsletter (via postal mail)
- Discounts on data transfer and custom programming services

"Plus Support Plan" – full software maintenance and limited technical support coverage

- 2 support incidents per month by phone, fax, or email (additional incidents at $30/incident)
- No-cost maintenance updates (service releases) delivered via postal mail on CD
- No-cost full version upgrades delivered via postal mail on CD
- HTS quarterly newsletter (via postal mail)
- Discounts on data transfer and custom programming services

ORDERING A SUPPORT PLAN

For more information on support plan pricing and/or to place an order, please call our toll-free sales line at 888-858-3247 or visit our Internet website at www.helpmate.net.

ADDITIONAL NOTES:

- New clients automatically receive 60 days of no charge support coverage (by phone, email, and fax) after their initial software purchase. After this 60-day period, clients can choose from our 3 support plans above (or choose no support plan at all).
- Clients not subscribed to any HTS Support Plan can still receive technical support assistance by phone on a pay-per-incident basis ($30/incident).
- Those evaluating our products, receive no-cost technical support assistance by phone, fax, or email for their pre-sales support inquiries.

TECHNICAL SUPPORT CONTACT INFORMATION:

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Phone: 859-384-7323 (M-F, 9:30am-5:00pm EST)
Fax: 859-384-1950
Email: support@helpmate.net
Internet: http://www.helpmate.net/support

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Chapter 2

2 Chapter 2 - Quick Start

2.1 Chapter 2 - Quick Start

This chapter is essential in understanding the basic concepts of the Church Helpmate 2002 system. It is probably the most important section of the CH2002 documentation. We strongly encourage that all individuals read through this short, but vital, chapter before using the CH2002 product - doing so will significantly enhance your ability to utilize CH2002 to its fullest potential.

Chapter 2 Sections:

- General Concepts - What You Need To Know
- Explorer Views - What You Need To Know
- Detail Views - What You Need To Know
- Households - What You Need To Know
- Individuals - What You Need To Know
- Contacts - What You Need To Know
- Groups - What You Need To Know
- Contributions - What You Need To Know
- Pledges - What You Need To Know
- Meetings & Attendance - What You Need To Know
- Visitations - What You Need To Know
- Reminders - What You Need To Know
- Sample Data Set
- Setting Up CH2002 for your Organization
- Getting Started - The First Steps

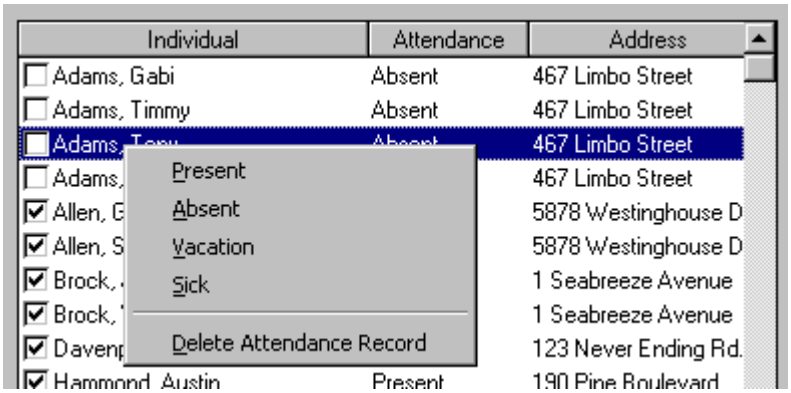
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2.2 General Concepts - What You Need To Know

(Chapter 2 - Quick Start)

- **Context-Sensitive Helpfile** - The CH2002 Helpfile system is context-sensitive. This means that when you activate the helpfile, the help system automatically displays the most appropriate help topic based on the current active screen/form. For example, let's say you're working in the Individual Detail Form and you have a question about one of the form's fields. Activating the helpfile from this form, will cause the helpfile to be opened and the topic associated with this form automatically displayed. To activate the context-sensitive helpfile, press the F1 key on your keyboard. Try it!

- **Right Mouse Button** - The CH2002 product takes full advantage of your mouse's right button. Clicking the mouse's right button will display a popup menu specific to the object which was clicked on. In many cases, this method is faster than using the traditional main menubar selection items or toolbar buttons. Try it! Below is an example of a right button pop-up menu from the Meeting Detail form:



- **Navigate Through the Application Your Way** - The CH2002 product provides several navigational methods to choose from. These include toolbar buttons, menubar items, Shortcut Key combinations, and Mouse Operations. We encourage you to experiment with these various methods to find which works most efficiently for you. For example, to save a record in the Individual Detail Form, you could:

  - Click the Save button with the mouse
  - Use the <TAB> key to position the cursor on the Save button, then press the <ENTER> key.
  - Use the <Ctrl+S> shortcut key combination.

- **"Flagged" Records** - Several of the CH2002 modules including the Households, Individuals, and Contacts modules, provide the ability to "flag" a record. Flagged records will be identified with a small red flag in both the Detail View and Explorer Views. The meaning of the flagged status is for the user to determine. It can be utilized in many ways. For example, a flagged individual may be someone who is going through some significant hardships and requires special attention. Or it could designate core members of the congregation. There are, no doubt, many more ways of utilizing the flag status.

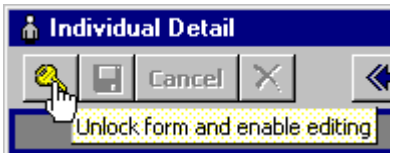
- **Required Data Entry Fields** - The CH2002 application provides many fields in CH2002 Detail View forms and other data entry forms. A certain number of these fields are considered to be "required" fields. That is, you must provide data for these fields in order to be able to save the record. These are the minimum number of fields you must provide data for when entering new records. For example, the Individuals Detail Form contains over 100 data fields!....however, only 4 are "required" fields (First name, last name, status, and Household). Required fields are identified by having an asterisk (" * ") located just to the right of the field.

  The example below shows how this is utilized. The "First" and "Last" name fields are required, however the "Prefix", "Middle", and "Suffix" fields are optional and are not required.

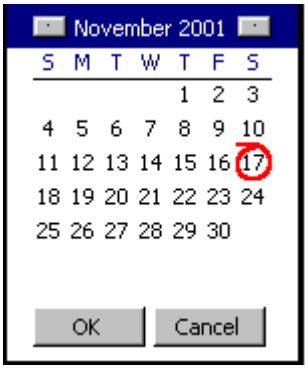
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- **Button Tooltips** - In many of the CH2002 forms there are buttons which have a graphic image (or icon) displayed on them rather than a full text description. In most cases, the graphic image will communicate to you the purpose and function of the button. If, however, you are unsure of a particular button's function, place the mouse cursor over the button and rest it there (without clicking) for a moment. Doing this will activate the button's "Tooltip". A tooltip is a pop-up text message which will give you information about the button. An example is shown below:



- **Calendar Pop-Up Control** - In most of the CH2002 forms where date data entry fields exist, a calendar pop-up button is found just to the right of the entry field. Clicking this calendar button opens a Calendar pop-up control which provides you a convenient graphical method of selecting the desired date.

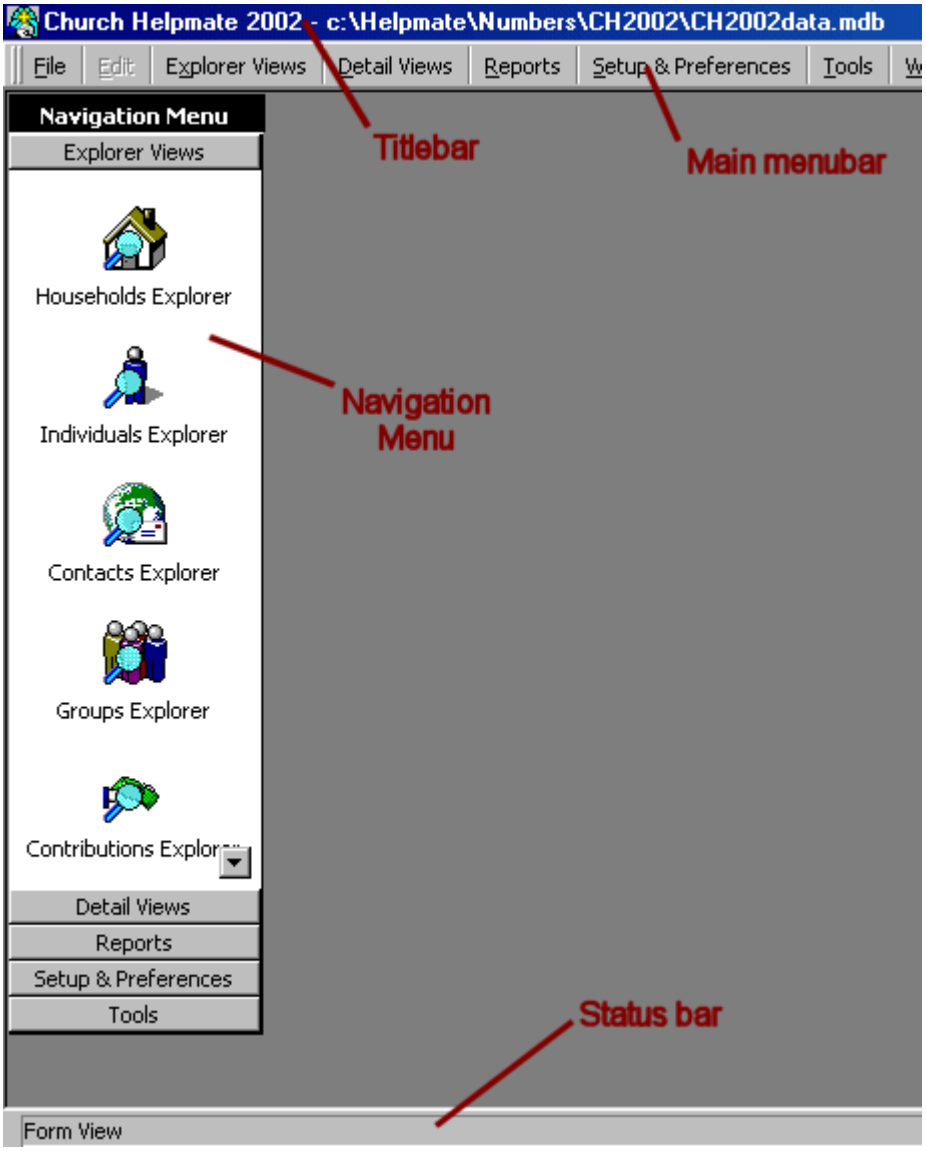


A red circle indicates the currently selected date. You can select the desired date by either using the mouse or through your computer keyboard's arrow keys.

NOTE: You are not required to utilize this Calendar pop-up control to set the value of the various date fields in CH2002. You always have the option of simply typing the desired date value into the date field.

- **Workspace Overview** - The image below displays the major items contained in the CH2002 product's workspace:

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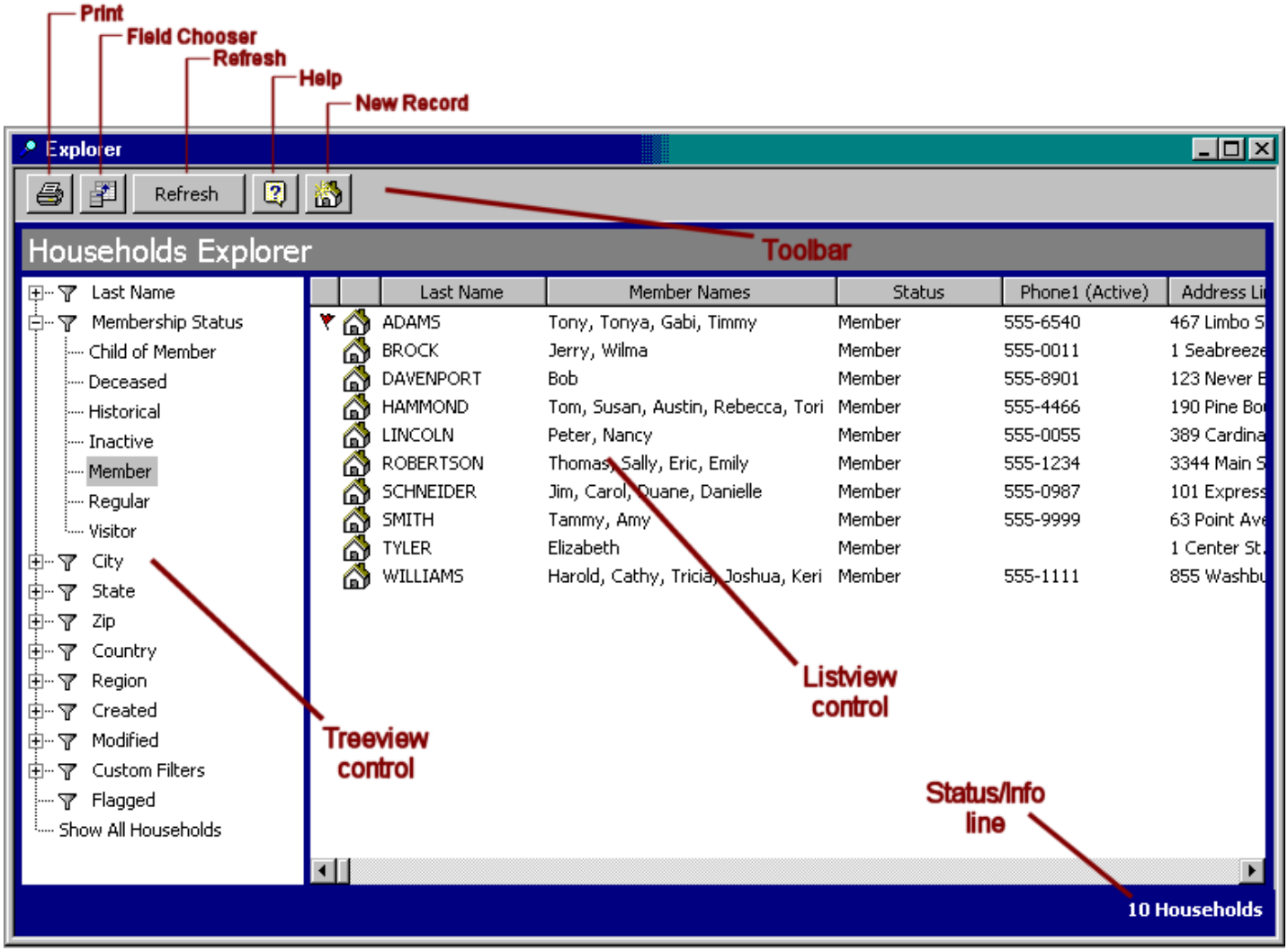
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2.3 Explorer Views - What You Need To Know

(Chapter 2 - Quick Start)

The CH2002 "Explorer" views are the main backbone of the application. The Explorer views provide various "list view" and "tree view" structures which result in an extremely powerful visual representation of your data. The CH2002 Explorer views function very much like the Windows Explorer provided by the Windows operating system. The Windows Explorer allows you to "explore" and manage the folders and files on your computer's hard drive. The CH2002 Explorer allows you to "explore" and manage your church's data in the same manner.

There is a unique Explorer view for each main CH2002 module (i.e. households, individuals, contacts, etc.). To change the Explorer view from one module to another, use the CH2002 Navigation Menu or use the "Explore Views" menu from the CH2002 Main Menubar. The graphic below is a "screen shot" of the Households Explorer view.



- **Read Only:** The CH2002 Explorer views are "read only" views of your database records. Therefore, you cannot create, edit, or delete records from the Explorer view. These functions must be performed through the CH2002 Detail Views.

- **Refreshing Data Display:** In most cases, changes made in any of the CH2002 Detail View forms will **NOT** automatically cause the CH2002 Explorer Views to be refreshed. To ensure that the data being viewed in an Explorer View is up-to-date, use the "Refresh" button located in the toolbar area of the Explorer form. Note that this Refresh button will change color from black to red to indicate that the Explorer needs to be refreshed.

- **Printing Displayed Data:** In most of the Explorer views, you can quickly print the data being displayed by using the Print

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button in the toolbar section of the Explorer screen.

- **ChoosingWhich Data FieldsTo Display:** In most of the Explorer views, you can choose which data fields (columns) you wish to be included Explorer's ListView control. To select the desired data fields, use the Field Chooser button in the Explorer's toolbar section.

- **ListView Sort Order:** Clicking on the heading of any of the ListView columns will cause the ListView data to be sorted by the this column. Subsequent clicking of the same column heading will toggle between ascending and descending sorts.

TIP: The Print button located in the toolbar section of the Explorer screen provides a quick way to print the currently displayed Explorer data. However, you'll want to utilize the nearly 40 report configurators provided by the product for more powerful and flexible reporting options.

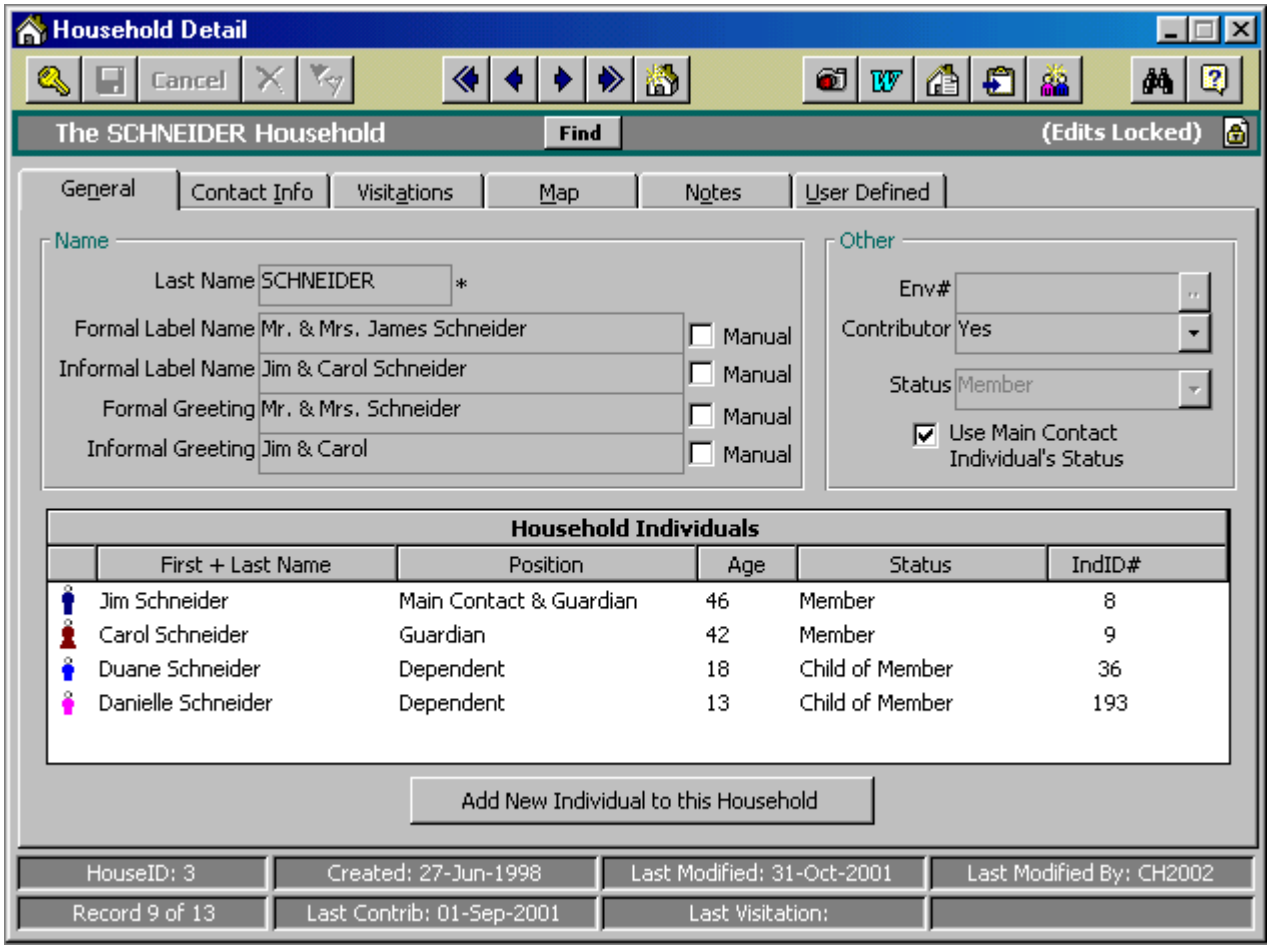
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2.4 Detail Views - What You Need To Know

(Chapter 2 - Quick Start)

While the CH2002 Explorer Views allow you to explore and manage your church's data, the CH2002 Detail views are used to focus in on a specific record's detailed information. The CH2002 Detail views provide much greater detail than the Explorer view. In addition, the CH2002 Detail views are where you will create, edit, and delete records in the database. The Explorer view can be considered as a "read-only" view, while the CH2002 Detail view can be considered as both a read and write view.

Each of the main CH2002 modules (i.e. households, individuals, contacts, etc.) have their own unique Detail view form (though they maintain a consistent look and feel). Shown below is a sample "screen shot" of the Household Detail Form view.



- **Locked Detail View Forms** - Many of the CH2002 Detail View forms utilize record locking to prevent unauthorized or accidental data editing. While in a locked mode, the form prevents editing of any data fields. To unlock the form and enable editing, the user must do one of the following:

  - Click the form's Unlock button 
  - Use the <Ctrl + E> shortcut key combination

While in the unlocked mode, many of the form's functions (such as record navigation) will be disabled until the form is saved and returned to the locked mode. A Detail View form will display its "locked" status in the upper right-hand area of the form as shown below:

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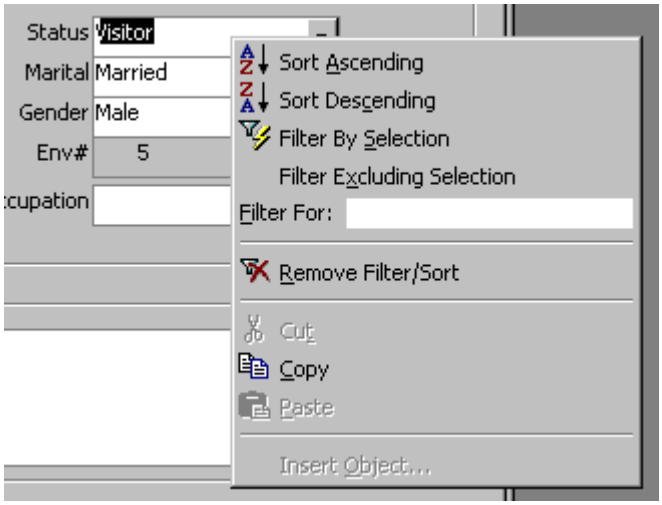




Also, while in locked mode, the form's data entry fields will have a gray background color. These data entry fields will have a white background when the form is in edit mode.

- **Filtering Records** - Normally the CH2002 Detail View forms record set includes all of associated records. For example, the Household Detail form normally includes all Household records and you can use the navigation buttons (the arrow buttons) at the top of the form to browse these all of the Household records. Several of the CH2002 Detail View forms have the ability to "filter" their record set. Filtering is defining a sub-set of records from the full set. For example, you could filter the Individual Detail form to include only records with membership status = "Visitor". Filtering does not modify any records. It simply limits the number of records displayed to only those meeting a criteria you specify.

  To filter one of the CH2002 Detail View forms, right-click on the field you wish to use as the filter criteria. For example, if you wish to filter the Individual Detail form for Status = "Visitor", then right-click the Status pull-down field on the Individual Detail form. A pop-up menu will be displayed as shown below.



If you type "Visitor" into the Filter For field and then press the <Enter> key, the Individual Detail form will display only those Individuals whose Status value = "Visitor". Alternately, if the current record's value of the field is equal to your desired filter value, you can use the Filter By Selection pop-up menu selection. In our example shown above the current record's Status value is "Visitor". Since this is the value we want to filter on, we could just select the Filter By Selection pop-up menu item rather than typing "Visitor" into the Filter For field.

You can apply multiple filters by repeating this process with another field. For example, you could filter the form to display only Individuals whose Status value = "Visitor" and whose Marital value = "Married". To do so, you would first right-click on the Status field and set the filter value for this field. Then, right-click the Marital field and set the filter for this field. Using multiple filters has an additive effect. That is, each time you add a filter criteria you are adding it to any

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filter criteria which may already be applied.

To remove all filters applied to the form, right-click anywhere on the form to display the pop-up menu and select Remove Filter/Sort. The form will then revert to displaying all records.

- **User Defined Fields** - The Household Detail Form, the Individual Detail Form, and the Contact Detail Form all provide "user-defined" fields for you to utilize however you like. In each case, there are 6 user-defined date fields, 6 user-defined text fields, 6 user-defined pull-down lists, and 6 user-definable checkboxes. The label for each of the user-defined fields is customizable so that you can easily see how it's being utilized. To setup and configure these user-defined fields, use the Setup & Preferences menu.

- **Full Navigational Capabilities** - Many of the Detail Forms allow the user to navigate (move) between records from within the Detail Form (without having to use the Explorer Views). For example, the Household Detail Form includes navigational buttons in the form's toolbar to move through the household records. Additionally, the Household Detail form includes a "Find" button which allows the user to choose a Household record to display from a list of Household names.

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2.5 Households - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Household" records to identify various individuals who share a common address. You can setup household records which consist of the traditional family members (mom, dad, brother, and sister - all with the same last name), or more complex cases (like mom, dad, brother, sister, dad's aunt, mom's sister, mom's sister's foster child,…. well, you get the idea).

By organizing these individuals into a common household record, CH2002's relational database reduces the amount of required data entry. For example, you'll only need to enter in the household's home phone number once - rather than having to enter it into each household member's individual record.

Below are some important concepts to know about Household records:

- There is no limit to the number of individuals that you can assign to a household.
- CH2002 allows you the ability to store 2 addresses for each household record (a primary and secondary address). You have the ability to specify which of these 2 addresses should be the "active" address when generating directories, mailing labels, letters, etc.
- There are 3 classifications of household member individuals: "Main Contact", "Guardians" (adults), and "Dependents". Every household should have one and only one individual classified as the Main Contact. In most cases, the Main Contact individual should be also classified as a Guardian (Adult) as well. Spouses of the Main Contacts should be designated as Guardians. Individuals not specified as Guardians will, by default, be considered Dependents. Classification assignments are made from the Individuals Detail Form (Households Tab). Below is an example of proper classification assignments:

  Example 1: John Smith (husband/father), Amy Smith (wife/mother), Tommy Smith (son), Julie Smith (daughter)

  John - Main Contact & Guardian
  Amy - Guardian
  Tommy & Julie - Dependents

  Variation of Example 1: Let's say, however, that John does not attend the church. You would likely then want to classify Amy as the Main Contact:

  Amy - Main Contact & Guardian
  John - Guardian
  Tommy & Julie - Dependents

  Note: If an adult extended family member (such as a grandparent, aunt, etc.) is living in the household and you want to include them in database, it may make more sense to create a separate household record for this individual.

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2.6 Individuals - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Individual" records to identify the various individuals who you wish to record and maintain in your church's database. You can choose to maintain individual records for individuals who've never even attended your church or only those who have formally chosen to be full-fledged members of the congregation (or anywhere in-between!).

Below are some important concepts to know about Individual records:

- Every individual record must be "assigned" to a household record - see Individuals Detail Form (Household Tab).
- Every individual record, whether the individual has been classified as "Main Contact", "Guardian", or "Dependent", is handled in the same manner. For example, the CH2002 application allows you to record the same amount of detailed information regardless of this classification. In addition, you can assign group memberships, record contributions & pledges, record attendance, and record visitations for any individual (regardless of their classification).
- Due to the relational nature of the CH2002 database, when deleting an individual record, all contribution, pledge, attendance, group membership, and visitation records associated with the individual will also be removed from the database.

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2.7 Contacts - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Contact" records to maintain information on the various individuals, businesses, vendors, organizations, and other contacts who interact with you and your church. Contact records are for contacts who are not part of your church membership and would therefore not be entered into the database as a Household/Individual.

Below are some important concepts to know about Contact records:

- You can organize your contact records by creating custom contact "categories" (for example, "Vendors", "Pastor's", "Politicians", etc.) (see Contacts Setup).

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2.8 Groups - What You Need To Know

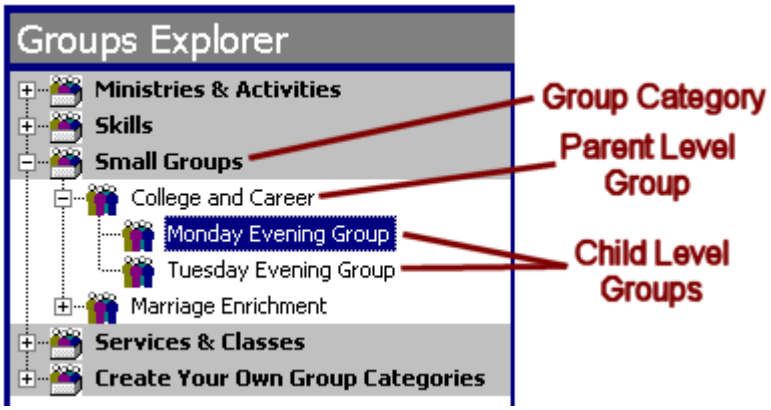
(Chapter 2 - Quick Start)

CH2002 utilizes "Group" records to organize and assign individuals to the various groups and activities within your church. For example, you can create a group called "Choir". Then you can assign membership to the group to all of the individuals who participate in the choir. Once you've created a group and assigned membership to it, you can easily generate mailing labels, form letters, and directories for your groups as well as track group meetings and attendance.

Below are some important concepts to know about Group records:

- The CH2002 Group hierarchy structure consists of "Group Categories" as the top level. You can fully manage the Group Categories as needed (ie. you can add, delete, rename, etc. Categories as desired). Below the Group Categories are the "Parent" level Groups. Below the Parent level Groups are the "Child" level Groups. A unlimited number of Parent level Groups can be assigned to a Group Category. Similarly, an unlimited number of Child level Groups can be assigned to a Parent level Group.

- Below is an example of the Category, Parent and Child level usage:



The Child level groups shown above all have the same Parent group ("College and Career") and Group Category ("Small Groups"). Please note that the terms "Parent" and "Child" here are not referring to human beings but to the Group hierarchy structure. For example, you might think of a Parent level Group and a *Major* Group, and a Child level Group as a *Minor* Group.

- You can create as many Group Categories, Parent level Groups, and Child level Groups as you like. CH2002 includes several Categories and Groups in its sample data set. These sample Categories and Groups can be utilized, modified, or removed by the user.

- Only individuals can be members of a group (i.e. Households and Contact records cannot be assigned membership to groups).

- Individuals can only be assigned group membership to Child groups. When assigning an individual membership to a Child group, CH2002 automatically assumes their membership to the associated Parent group. For example, when Tom White is assigned group membership to the "Monday Evening Group" (Child level group), he has an automatic "assumed" membership to the "College and Career" Parent level group.

- As a rule of thumb, if you are going to be assigning multiple individuals to a particular group, use the Group Detail Form. If you are going to assigning a specific individual's membership to multiple groups, use the Individual Detail Form (Groups Tab).

- For each group, you can designate whether or not it should be a default membership group, so that new individuals being added to the database are automatically given membership to the group.

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2.9 Contributions - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Contribution" records to record and maintain information on financial contributions given to the church by Individuals, Households, and Contacts.

Below are some important concepts to know about Contribution records:

- CH2002 allows Contributions to be designated as coming from Individual, Household, or Contact records. It is up to you and your church how you wish to designate contributions from donors - either by associating them with the individual or with the individual's household. It is recommended to be consistent with this in order to reduce any confusion in data entry and reporting procedures. For example, let's say you record contributions coming from John Smith as coming from the SMITH household, but record a pledge coming from him to his individual record. John's contributions will never be applied to the pledge - since the contributions are in his household's name and the pledge is in his name (consistency is important here). To facilitate this, every individual, household, and contact record has a "Contributor-Type" field which allows the user to specify whether or not the particular record is a contributor or not.

- You can define as many contribution "Funds" as you desire (see Contributions Setup). Each contribution record must be designated to a specific fund.

- CH2002 utilizes Contribution "Batches" to organize contribution records. A Contribution "Batch" simply a set (or group) of contribution records. A Contribution Batch is associated with a particular date. Therefore, all contributions in a particular batch are recorded as given on the batch date. Batches allow you to group your contribution records in many ways, making handling contributions more manageable for you and your church. For example, you may want to maintain separate batches for each of your church services (i.e. 9:30am service and 11:00am service) and/or for each of your data entry personnel.

- CH2002 does not require that Contribution records be removed as an "end-of-year" process. The application is able to record and maintain data for multiple years with no issues. However, a Purge utility is provided to easily remove historical contribution and/or pledge data if the user wishes to do so.

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2.10 Pledges - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Pledge" records to record and track details on financial pledges (promises) made by Individuals, Households, and Contacts.

Below are some important concepts to know about Pledge records:

- CH2002 allows Pledges to be designated as coming from Individual, Household, or Contact records. It is up to you and your church how you wish to designate pledges from donors - either by associating them with the individual or with the individual's household. It is recommended to be consistent with this in order to reduce any confusion in data entry and reporting procedures. For example, let's say you record contributions coming from John Smith as coming from the SMITH household, but record a pledge coming from him to his individual record. John's contributions will never be applied to the pledge - since the contributions are in his household's name and the pledge is in his name (consistency is important here).

- You can define as many contribution/pledge "Funds" as you desire (see Contributions Setup). Each pledge record must be designated to a specific fund.

- CH2002 does not require that Pledge records be removed as an "end-of-year" process. The application is able to record and maintain data for multiple years with no issues. However, a Purge utility is provided to easily remove historical pledge data if the user wishes to do so.

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2.11 Meetings & Attendance - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Meeting" records to record and maintain information on specific group meetings. For example, the Choir group's rehearsal on Nov 1, 2001 could be recorded as a meeting. CH2002 utilizes "Attendance" records to record and maintain attendance data for meeting records. For example, let's say you create a meeting record for the Choir group's rehearsal on Nov 1, 2001. CH2002 will automatically generate attendance records for each of the individuals who are members of the Choir group. These attendance records can then be used to specify whether or not a particular group member was present at the meeting.

Below are some important concepts to know about Meeting & Attendance records:

- A Meeting record is associated with a specific Group and a specific date (for example, the Choir group's Nov 1, 2001 rehearsal).
- Attendance records are associated with a particular Meeting and a particular Individual record. For example, John Smith's attendance to the Nov 1, 2001 Choir group's rehearsal.
- Meeting records can only be generated for Group's who have been designated as attendance-tracked groups. You can specify whether or not a Group is attendance-tracked through the Group Detail Form.
- The Meetings Explorer's TreeView display is very similar to the Groups Explorer's TreeView display except that only Groups who have been designated as attendance-enabled Groups will be shown.
- The Meeting Detail Form provides 2 modes of setting attendance: Household mode and Normal mode. While in the Household mode, the user specifies the attendance value for the household. All household member individuals in the group will receive the same attendance value automatically. The user may over-ride this if there is a household individual who has an attendance value different than the other household individuals. In most cases, utilizing the Household mode speeds up the attendance data entry process, since individuals of the same household will most often than not have the same attendance value.

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2.12 Visitations - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Visitation" records to record and maintain detailed information on visitations (communications) between Household or Individuals and the church staff. Visitations can be events such as phone calls, letters, in-person meetings, etc. For example, on Nov 8, 2001 Pastor Schmidt visited the Adams household at their home to discuss their interest in becoming formal members of the church.

Below are some important concepts to know about Visitation records:

- A Visitation record is associated with a specific date.
- A Visitation record is associated with either an Individual record or a Household record.
- A Visitation record can be recorded after or before (for scheduling purposes) the visitation actually takes place.
- A Visitation record can be specified as having a required Followup action. The followup can have an associated date, responsible person, and detailed description.
- Every Visitation record has a status value assigned to it. These status values are:

  - "Closed" (Visitation has occurred and either no followup was required or the followup has been completed)
  - "Open" (Visitation has occurred, however there is still an open followup action required)
  - "Scheduled" (Visitation has not yet occurred)

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2.13 Reminders - What You Need To Know

(Chapter 2 - Quick Start)

CH2002 utilizes "Reminder" records to allow the user to store important reminders in the CH2002 database. Reminders might be used for many reasons. For example, to remind the user to backup the CH2002 database file, to remind the user to send out letters to all 1st time visitors from last Sunday's services, to remind the user to distribute the prayer request list to the church staff, ...and so on.

Below are some important concepts to know about Reminder records:

- A Reminder record is associated with a specific date.
- A Reminder record can be configured as a one-time reminder or as a recurring reminder (with specified frequency).
- "Acknowledging" a one-time Reminder will delete the reminder record. "Acknowledging" a recurring Reminder will increment the remind

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2.14 Sample Data Set

(Chapter 2 - Quick Start)

The CH2002 product includes in its initial installation a sample data set consisting of numerous sample data records. This sample data set provides new users the immediate ability to "play" with the application.

You may either modify the sample data records with actual (real) data (for example, change the name, address, phone#'s, etc of a sample Household record to match one of the actual households in your congregation), or you may delete the sample data records and start your "real" data entry with new records. There are purging tools found under the "Tools | Database Utilities" menu to assist you with deleting large numbers of records quickly.

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2.15 Setting Up CH2002 For Your Organization

(Chapter 2 - Quick Start)

Before entering your church's data into the CH2002 database, you'll want to customize certain aspects of the application for your church. CH2002 utilizes several Setup and Preference screens to facilitate this process. Using these setup screens, you will setup aspects such as user-defined fields, the security system, default settings for data entry, and various other program preference settings. You can find these setup and preference screens using the "Setup & Preferences" top main menubar and Navigation Menu.

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2.16 Getting Started - The 1st Steps

(Chapter 2 - Quick Start)

Follow these simple steps to get off to a good beginning with CH2002:

1. Completely read this chapter (Chapter 2 - Quick Start) thoroughly.

2. If you are upgrading from a previous version, import your previous version's data file into a CH2002 data file (Chapter 19 - Upgrading From A Previous Version).

3. Delete the sample data records included with the CH2002 installation (see Sample Data Set). NOTE: This step is optional - rather than deleting the sample records, you may choose to modify them to represent "real" records for your church when performing Step #6.

4. Setup the application for your church using the Setup screens found under the "Setup & Preferences" section of the top main menubar or Navigation Menu.

5. Import any existing membership data you may have into CH2002 (see Chapter 18 - Advanced Topics - Importing Data).

6. Enter your current Household, Individual, and Contact records into the database (unless you were able to import all of this data in step 5).

7. Enter any current activity data records such as Contributions, Pledges, Group Membership, and Attendance records.

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Chapter 3

3 Chapter 3 - Setup & Preferences

3.1 Chapter 3 - Setup & Preferences

Before entering your church's data into the CH2002 database, you'll want to configure certain aspects of the product for your church. This Chapter will discuss this process in detail.

Chapter 3 Sections:

- General Program Preferences
- Network/Multi-user Setup
- Households Setup
- Individuals Setup
- Contacts Setup
- Groups Setup
- Contributions Setup
- Visitations Setup
- User Information Setup
- Security System Setup
- Postal Code Lookup Table Setup
- Regional Settings

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3.2 General Program Preferences

3.2.1 General Program Preferences

(Chapter 3 - Setup & Preferences)

Church Helpmate 2002 utilizes many "Preference" settings to allow the user to specify options such as screen colors, data entry default values, etc. Preference settings are "local" to the computer running CH2002 - meaning that the settings only affect the user's particular computer. Any other computers running CH2002 on the network (even though they might be sharing the same CH2002 data file) will not be affected by these Preference settings.

To reach the Preferences screen, select "Setup & Preferences | General Program Preferences" from the CH2002 main menubar or Navigation Menu.



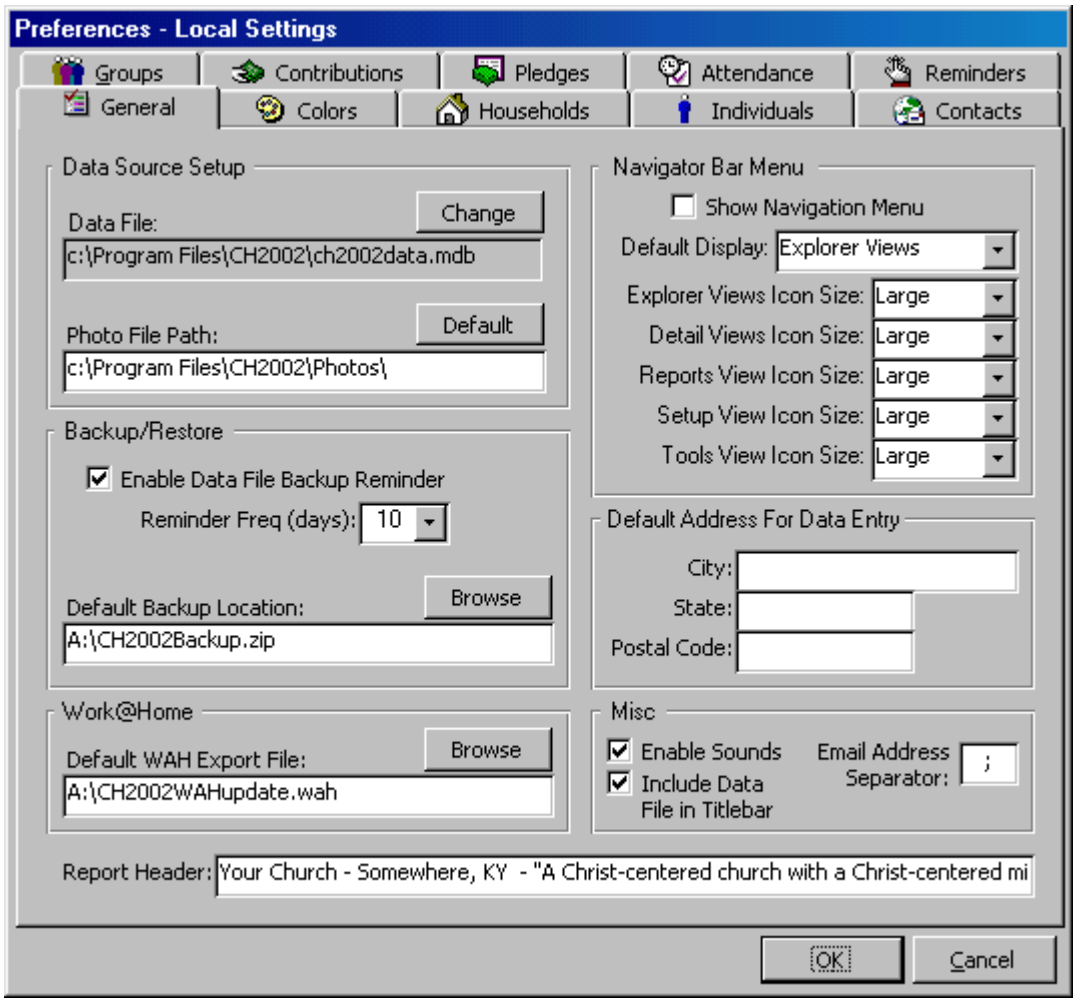
As shown above, the Preferences screen is divided into the following "tabs" (sections):

"General" Tab, "Colors" Tab, "Households" Tab, "Individuals" Tab, "Contacts" Tab, "Groups" Tab, "Contributions" Tab, "Pledges" Tab, "Attendance" Tab, "Reminders" Tab

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3.2.2 General

(Chapter 3 - Setup & Preferences)



***"Data Source Setup"* Section:**

- The "Data File:" displays the folder path and filename of the current active CH2002 data file. To specify a CH2002 data file to be used by the CH2002 program, use the "Change" button.
- The Photo File Path holds the folder location where the photo image files (for Households, Individuals, and Contacts) are located.

***"Backup/Restore"* Section:**

- Use the "Enable Data File Backup Reminder" checkbox to enable the backup prompt when exiting the CH2002 program.
- Use the "Reminder Freq (days)" parameter to specify the reminder frequency for the automatic backup prompt (the "Enable" checkbox must be checked for this parameter to take effect).
- Use the "Default Backup Location" parameter to set the default location and filename when creating backups. This location and filename is used also as the default location when running the data file restore process.

***"Work@Home"* Section:**

- Use the "Default WAH Export File" parameter to specify the default location and filename when creating Work@Home Update file exports.

***"Default Address For Data Entry"* Section:**

If desired, CH2002 can automatically populate the City, State, and Postal Code/Zip Code fields with default values when entering in new Household records.

***"Navigator Bar Menu"* Section:**

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These settings affect the display of the menu items of the CH2002 Navigation Menu which is the main ListBar control located on the left-hand side of the CH2002 screen.

***"Misc"* Section:**

- Use the "Enable Sounds" checkbox to indicate whether or not CH2002 should provide audio feedback of user input actions such as clicking a button or selecting an item from a menu. To enable this feature, check the "Enable Sound" checkbox.
- Use "Include Data File in Titlebar" checkbox to indicate whether or not the folder path and filename for the current CH2002 data file should be displayed in the CH2002 program window's titlebar.
- Use the Email Address Separator field to specify the separator character to be used when generating bulk emails.

***"Report Header"* Section:**

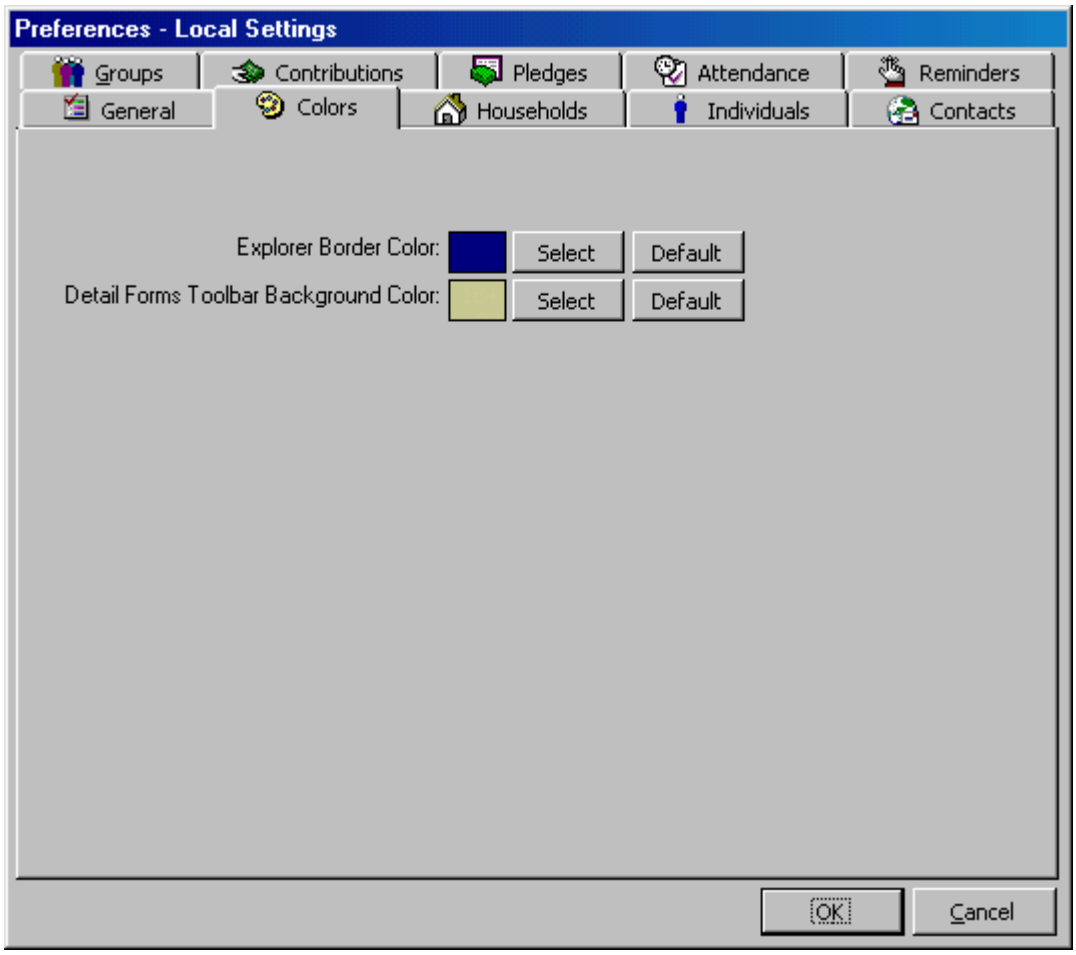
Specify the text you would like to be displayed in the header (top) portion of reports produced by CH2002.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.3 Colors

(Chapter 3 - Setup & Preferences)



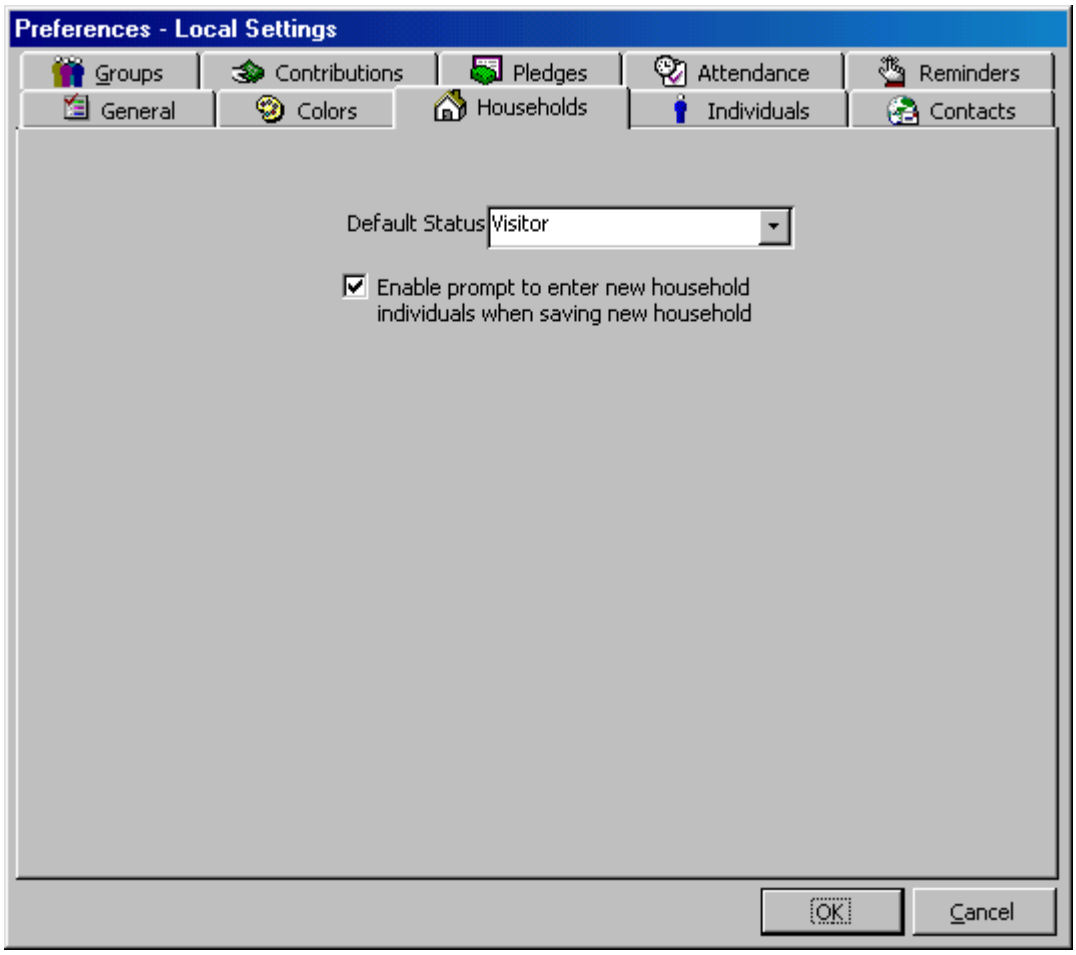
The Colors tab allows the user to specify color settings to be utilized by various program objects.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.4 Households

(Chapter 3 - Setup & Preferences)



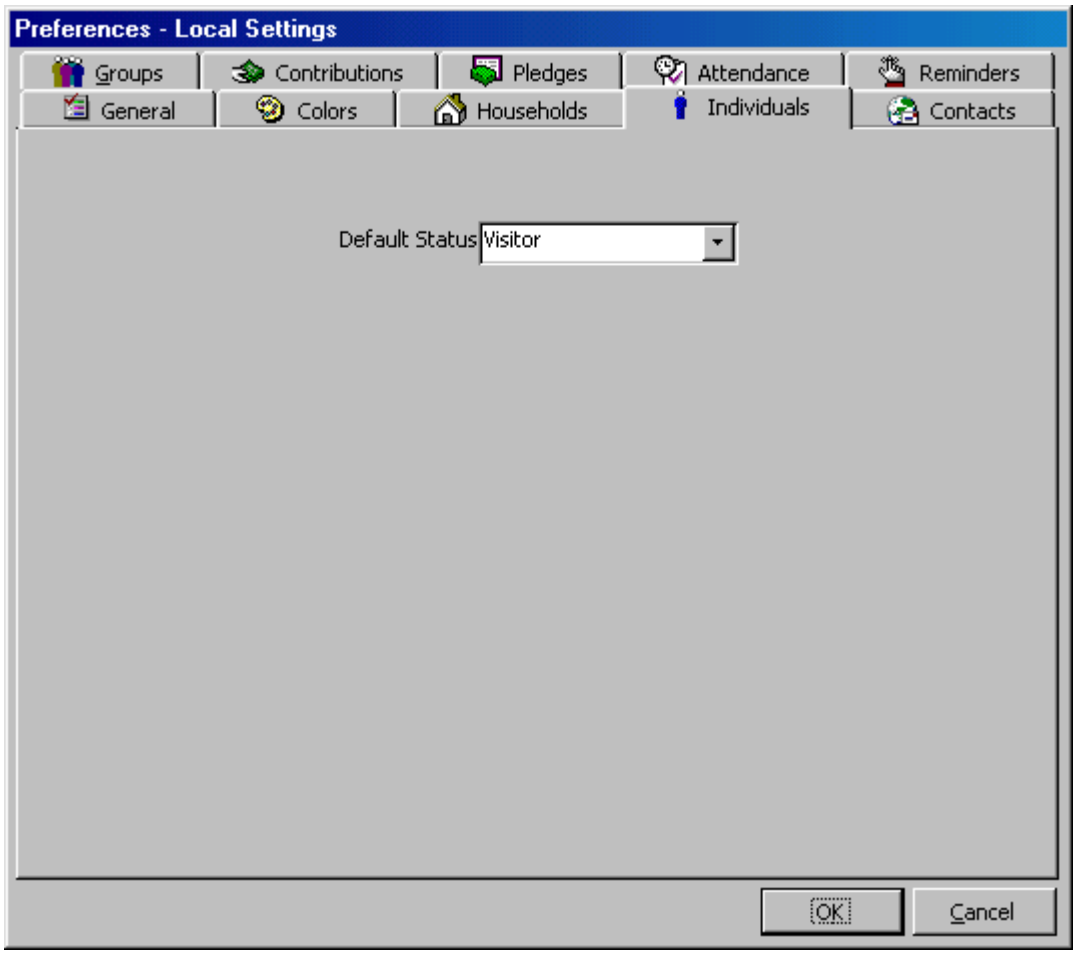
The "Households" tab allows the user to specify default settings with regard to the data entry of Household records.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.5 Individuals

(Chapter 3 - Setup & Preferences)



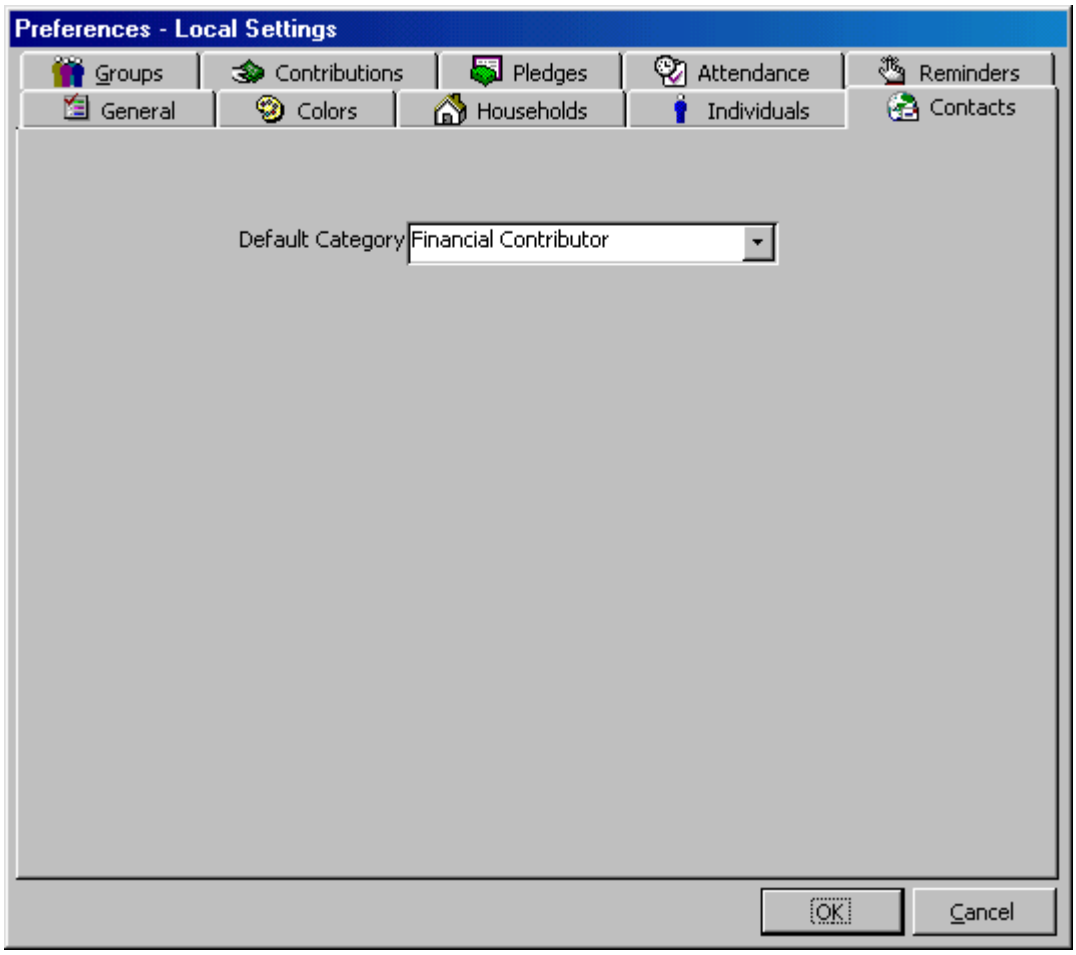
The "Individuals" tab allows the user to specify default settings with regard to the data entry of Individual records.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.6 Contacts

(Chapter 3 - Setup & Preferences)



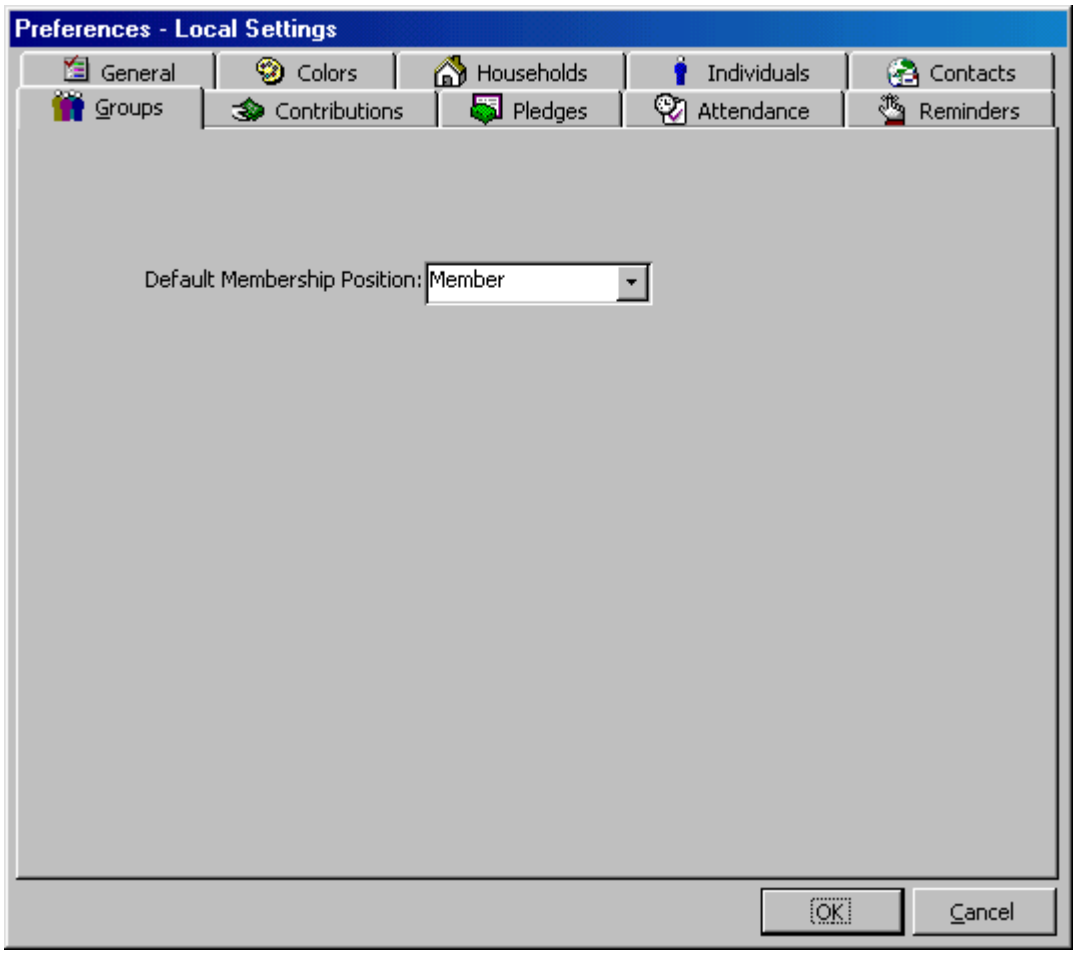
The "Contacts" tab allows the user to specify default settings with regard to the data entry of Contact records.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.7 Groups

(Chapter 3 - Setup & Preferences)



The "Groups" tab allows the user to specify default settings with regard to the data entry of Group records.

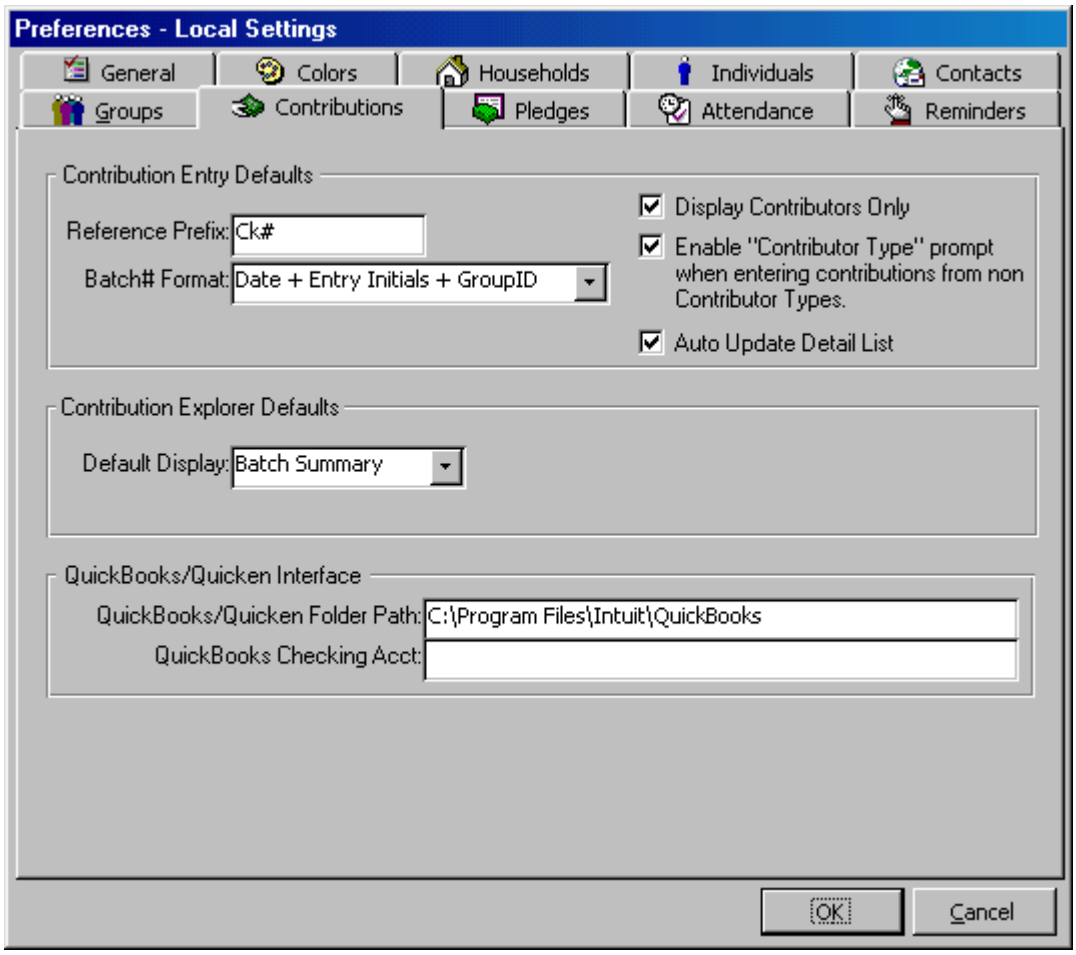
- Use the "Default Membership Position" field to specify the default value for the Position (role) field when adding individuals to a Group. NOTE: This Membership Position refers to the membership position or role for an individual in a particular Group and is not the same as the individual's church membership "Status" field.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.8 Contributions

(Chapter 3 - Setup & Preferences)



The "Contributions" tab allows the user to specify default settings with regard to the data entry and display of Contribution records.

"Contribution Entry Defaults" Section:

In this section, you can specify default settings related to contribution entry (Contribution Batch Detail Form).

- Use the "Reference Prefix" field to specify a prefix for the contribution "Reference" field which gets automatically inserted into this field during data entry. For example, you could set the Reference Prefix to "Ck#" to eliminate having to type these characters into the Reference field during contribution entry. You could then simply type the number of the check after these prefix characters.
- Use the "Batch# Format" fields to specify the default format when creating new batch records.
- Use the "Display Contributors Only" checkbox to set the default value of this checkbox as it appears on the Contribution Batch Detail Form.
- Use the "Enable 'Contributor Type' prompt when entering contributions from non Contributor Types" to enable/disable the automatic prompt during contribution data entry. When enabled, this prompt will ask the user immediately after they select a non Contributor Type in the Contribution Batch Detail form if they would like the selected Household, Individual, or Contact to be configured as a Contributor Type.
- Use the "Auto Update Detail List" checkbox to set the default value of this checkbox as it appears on the Contribution Batch Detail Form.

"Contribution Explorer Defaults" Section:

In this section, you can specify default settings related to the Contributions Explorer.

- Use the "Default Display" field to specify the default setting for the "Display" option in the Contributions Explorer's toolbar.

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"QuickBooks/Quicken Interface" Section:

In this section, you can specify settings regarding the interfacing with the QuickBooks or Quicken product.

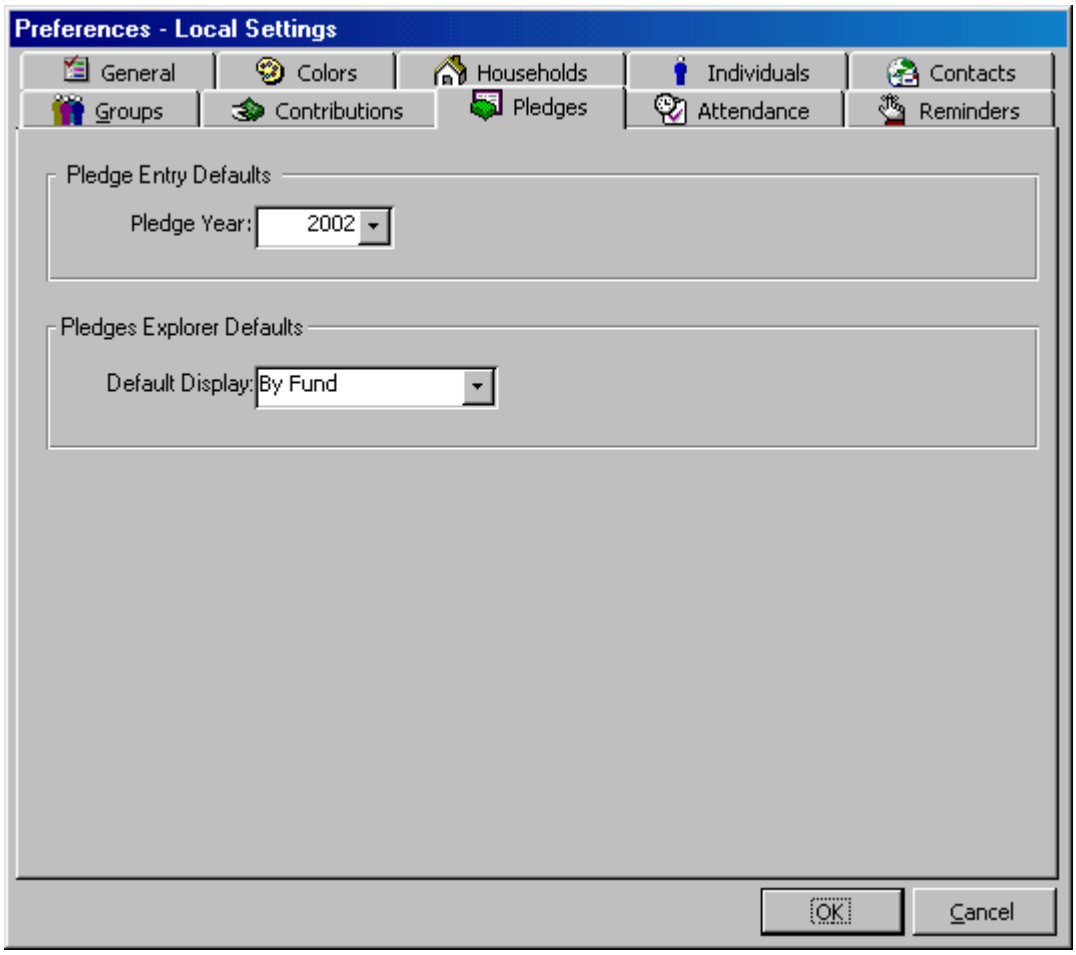
- Use the "QuickBooks/Quicken Folder Path" to specify the location where you have QuickBooks or Quicken installed on your computer. This folder path is used as the export path when exporting a QuickBooks IIF file or a Quicken QIF file out of CH2002.
- Use the "QuickBooks Checking Acct" field to specify the name of the QuickBooks checking account you wish to associate with the IIF QuickBooks file exports. When importing IIF files generated by CH2002 into QuickBooks, the deposit transaction will show up under the account specified by this field.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.9 Pledges

(Chapter 3 - Setup & Preferences)



The "Pledges" tab allows the user to specify default settings with regard to the data entry of Pledge records.

"Pledge Entry Defaults" Section:
In this section, you can specify default settings related to pledge record entry (Pledge Detail Form).

- Use the "Pledge Year" field to specify the default Pledge Year value when creating new pledge records.

"Pledges Explorer Defaults" Section:
In this section, you can specify default settings related to the Pledges Explorer (Pledges Explorer).

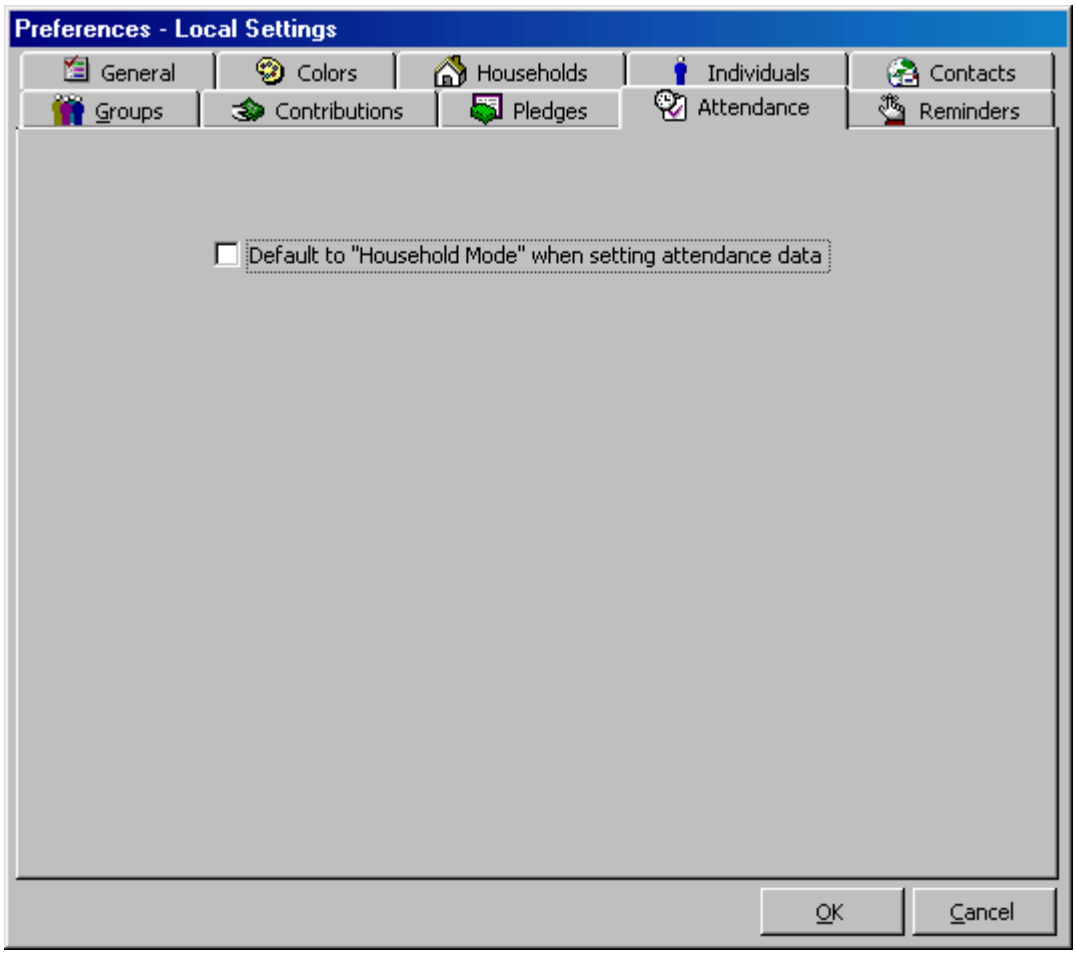
- Use the "Default Display" setting to configure the default value for the Pledges Explorer's "Display" value.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.10 Attendance

(Chapter 3 - Setup & Preferences)



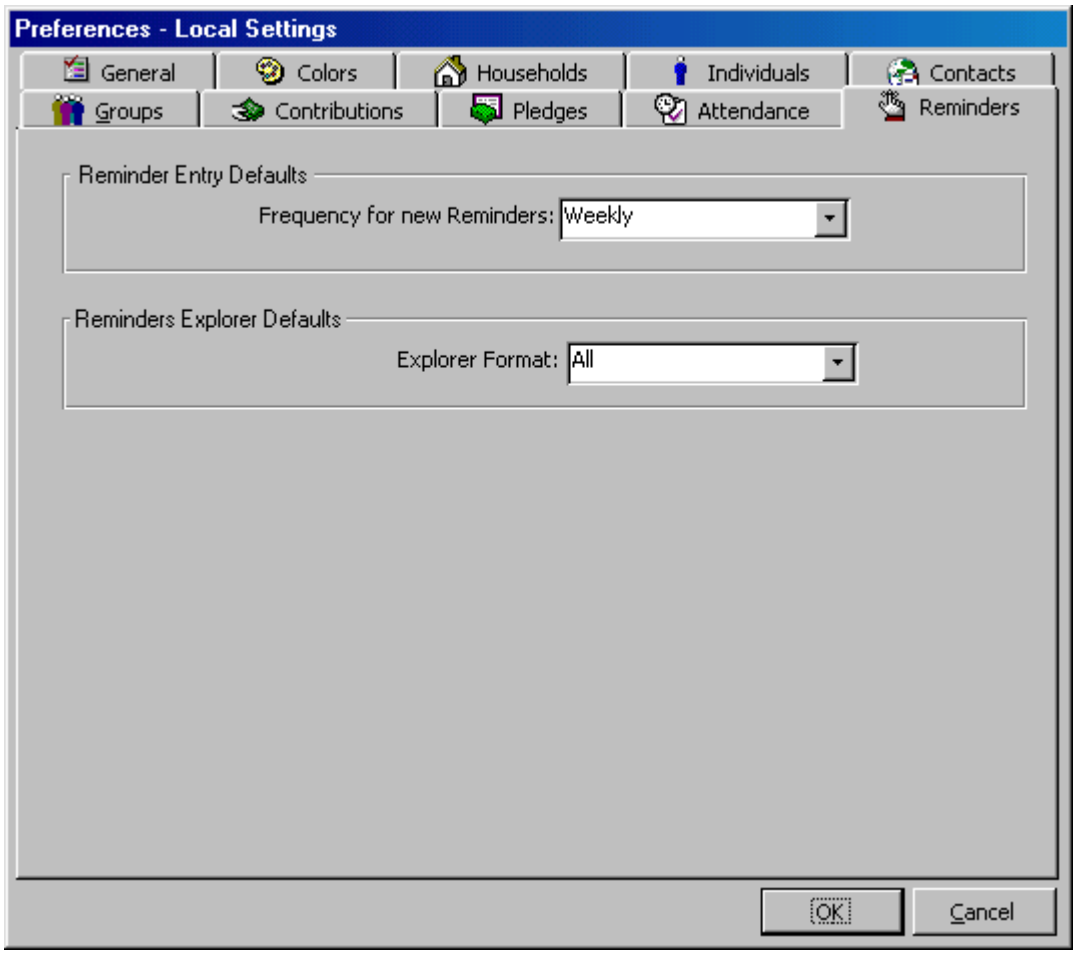
The "Attendance" tab allows the user to specify default settings with regard to the data entry of Attendance records.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

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3.2.11 Reminders

(Chapter 3 - Setup & Preferences)



The "Reminders" tab allows the user to specify default settings with regard to the data entry and display of Reminder records.

"Reminder Entry Defaults" Section:
In this section, you can specify default settings related to Reminder entry (Reminder Detail Form).

- Use the "Frequency for new Reminders" setting to specify the default Frequency value when entering new Reminder records.

"Reminders Explorer Defaults" Section:
In this section, you can specify default settings related to the Reminders Explorer (Reminders Explorer).

- Use the "Explorer Format" setting to specify the default display value for the Reminders Explorer.

TIP: These preference settings are localized settings which affect only the computer on which the preference setting was made. Other computers which might be running CH2002 and linked to the same data file will NOT be affected by preference settings.

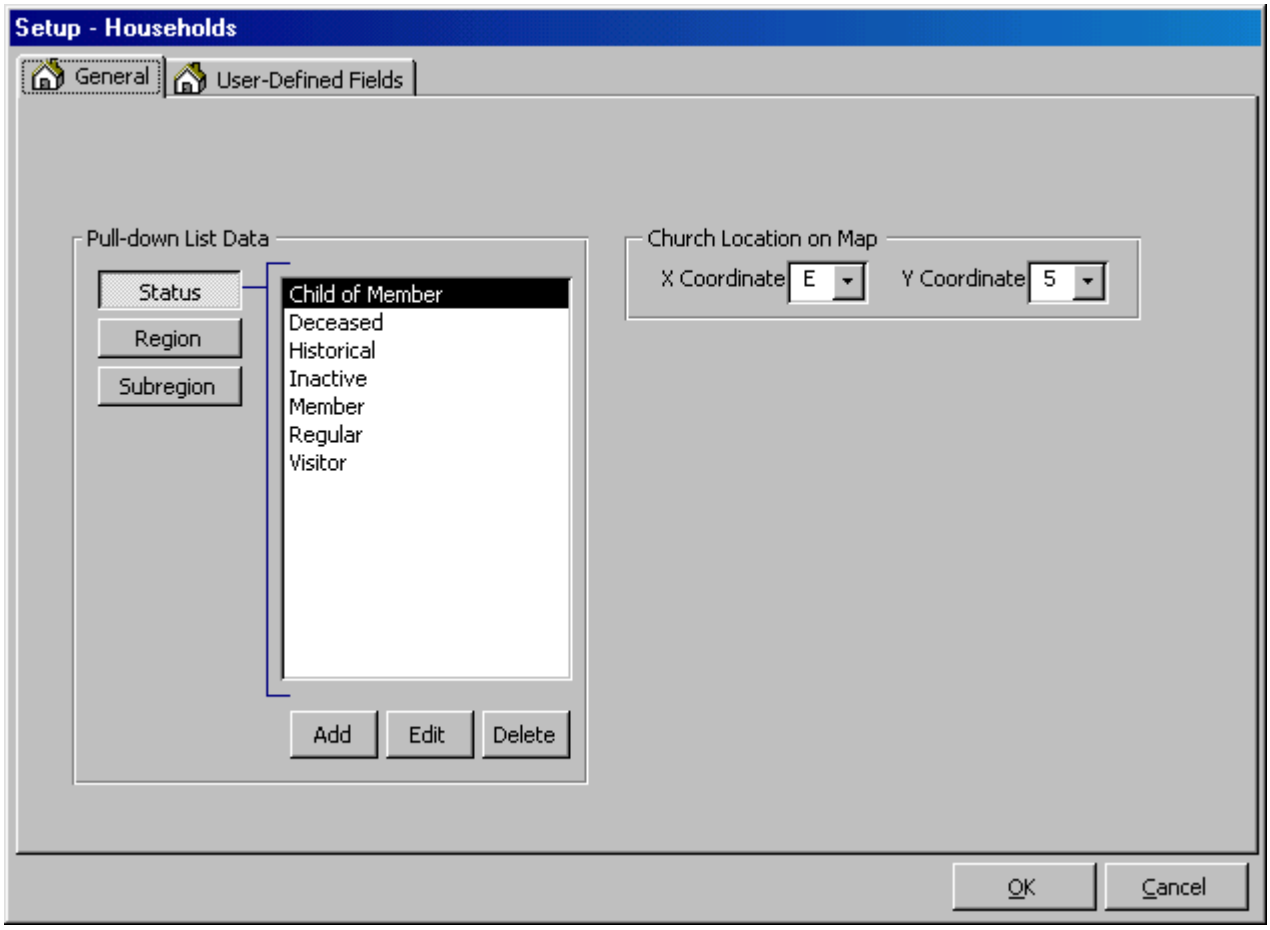
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3.3 Households Setup

(Chapter 3 - Setup & Preferences)

To reach the Households Setup screen, select "Setup & Preferences | Households Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:



***"Pull-down List Data"* Section:**

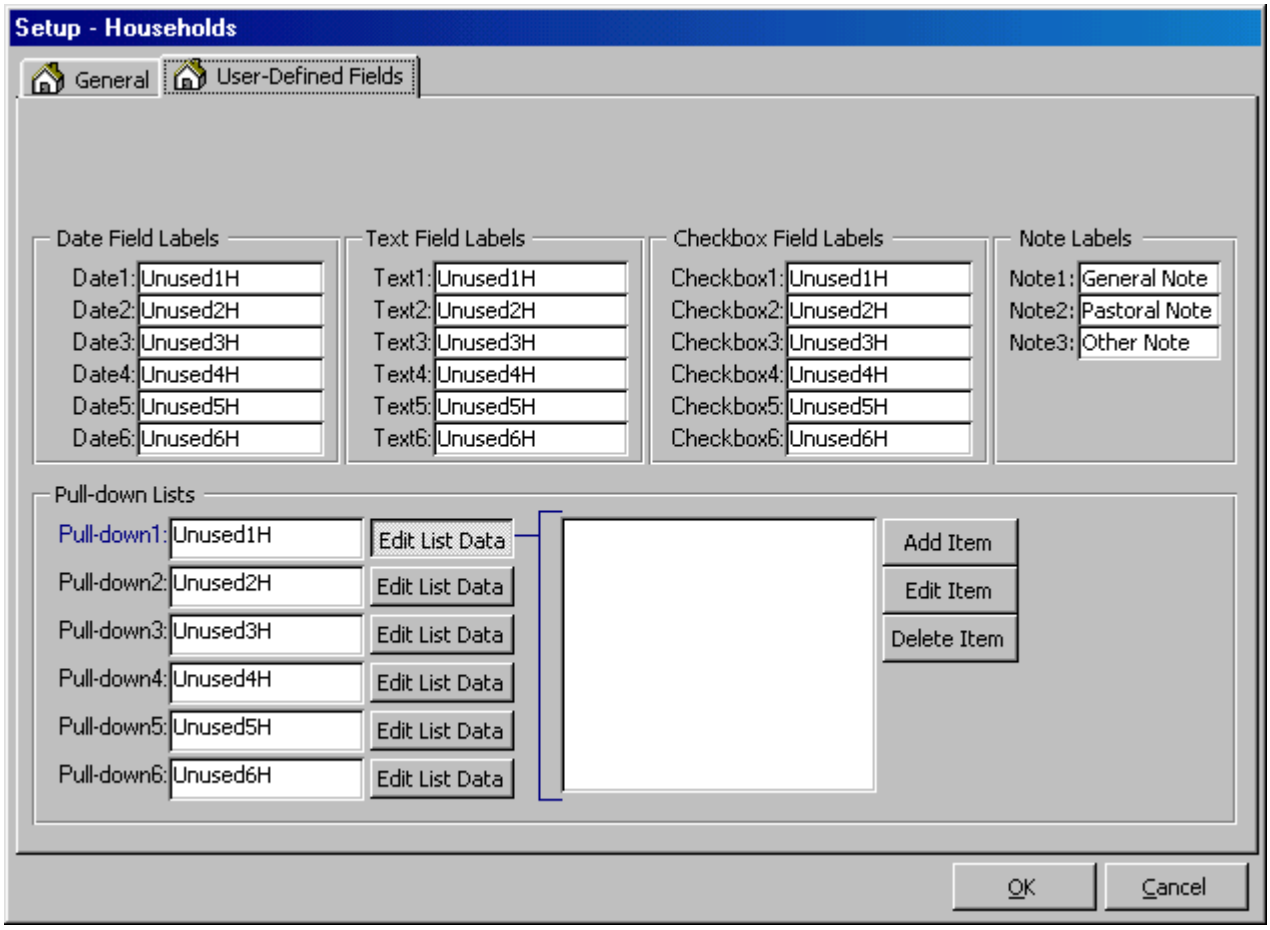
- Use this section to manage the values contained in the various pull-down lists associated with Household records.

***"Church Location on Map"* Section:**

- Use this section to specify the location of the church icon on the "Map" tab of the Household Detail Form.

"USER-DEFINED FIELDS" TAB:

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***"Date Field Labels"* Section:**
This is where you specify the names of the user-defined Household date fields. The name you specify will be utilized for all reports and forms where the user-defined date fields are displayed.

***"Text Field Labels"* Section:**
This is where you specify the names of the user-defined Household text fields. The name you specify will be utilized for all reports and forms where the user-defined text fields are displayed.

***"Checkbox Field Labels"* Section:**
This is where you specify the names of the user-defined Household checkbox fields. The name you specify will be utilized for all reports and forms where the user-defined checkbox fields are displayed.

***"Note Labels"* Section:**
This is where you specify the names of the 3 Household-based note fields.

***"Pull-Down Lists"* Section:**
This is where you specify the names of the user-defined Household pull-down list fields as well as the data contained in these pull-down lists. The name you specify will be utilized for all reports and forms where the user-defined pull-down list fields are displayed.

NOTE: Your church may or may not have use for these user-defined Household fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

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TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

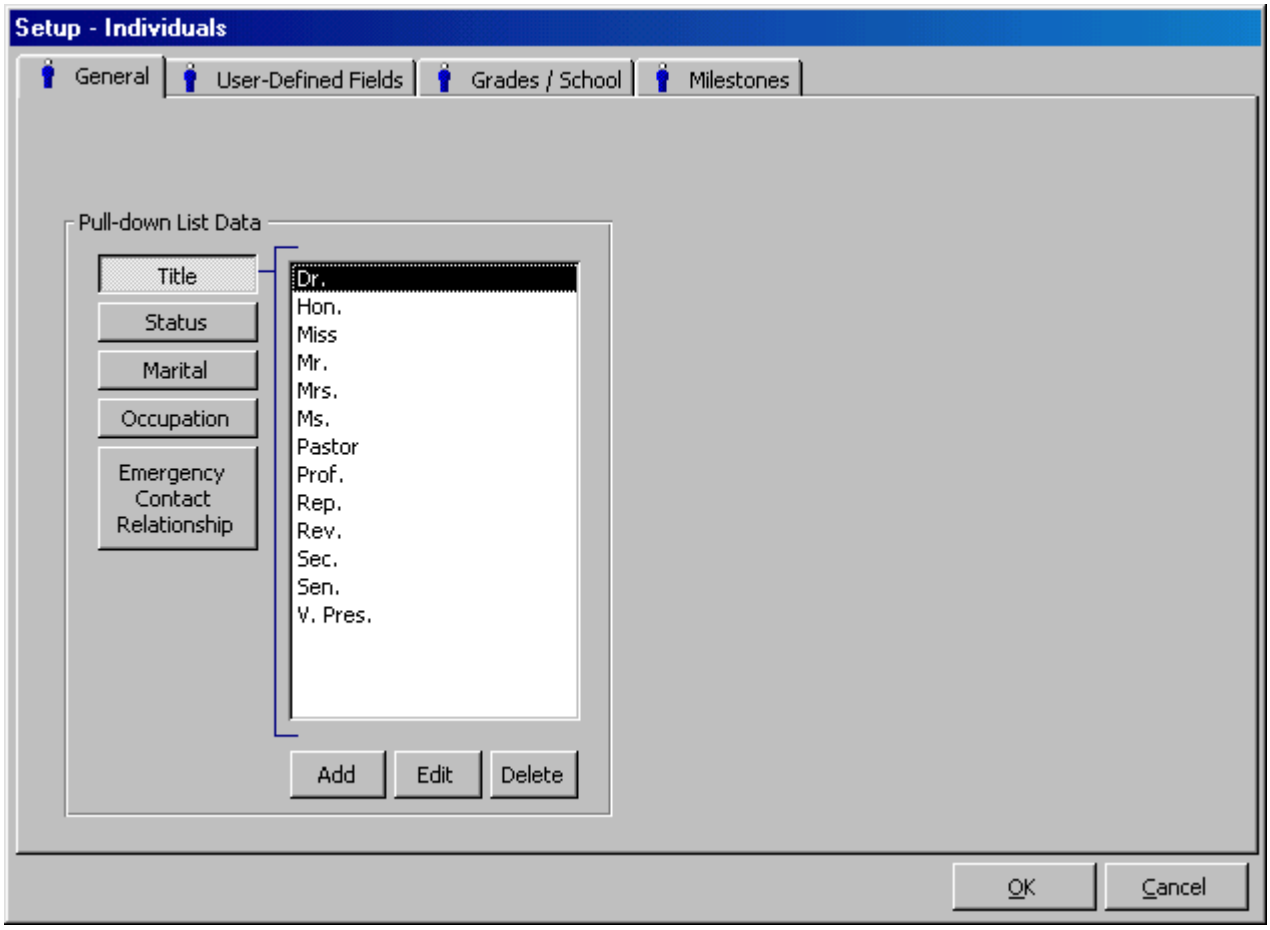
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3.4 Individuals Setup

(Chapter 3 - Setup & Preferences)

To reach the Individuals Setup screen, select "Setup & Preferences | Individuals Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:

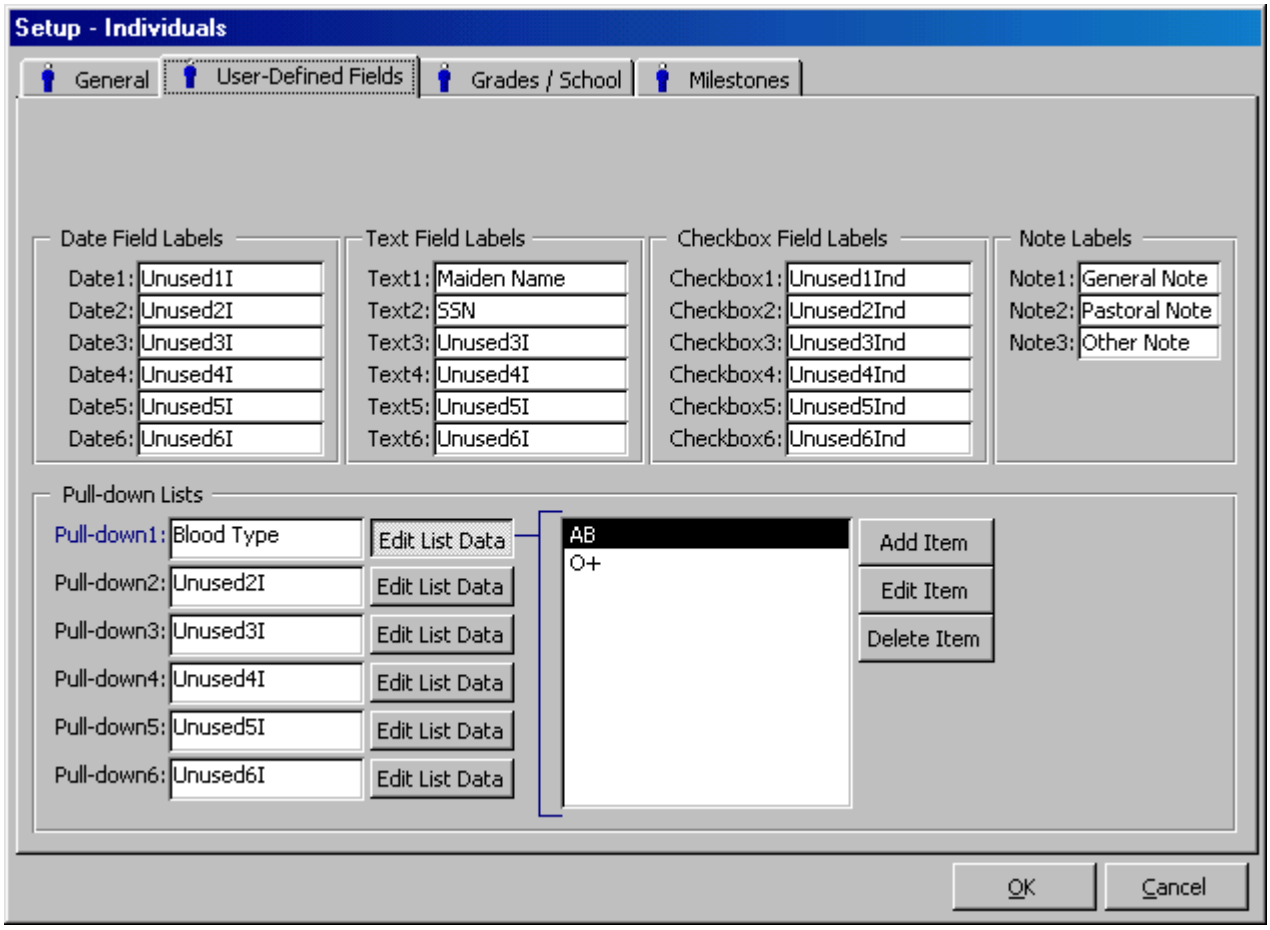


***"Pull-down List Data"* Section:**

Use this section to manage the values contained in the various pull-down lists associated with Individual records.

"USER-DEFINED FIELDS" TAB:

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***"Date Field Labels"* Section:**
This is where you specify the names of the user-defined Individual date fields. The name you specify will be utilized for all reports and forms where the user-defined date fields are displayed.

***"Text Field Labels"* Section:**
This is where you specify the names of the user-defined Individual text fields. The name you specify will be utilized for all reports and forms where the user-defined text fields are displayed.

***"Checkbox Field Labels"* Section:**
This is where you specify the names of the user-defined Individual checkbox fields. The name you specify will be utilized for all reports and forms where the user-defined checkbox fields are displayed.

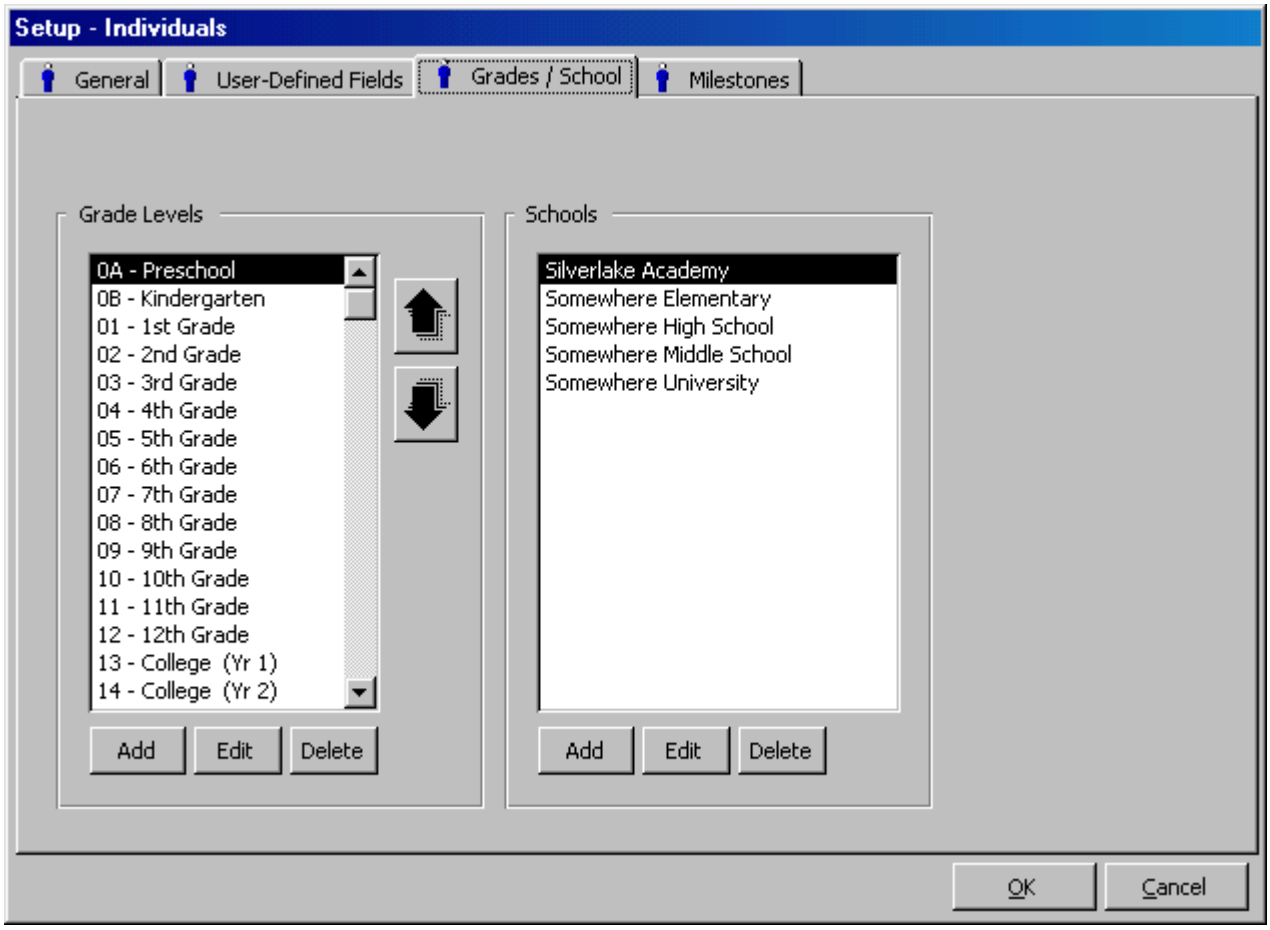
***"Note Labels"* Section:**
This is where you specify the names of the 3 Individual-based note fields.

***"Pull-Down Lists"* Section:**
This is where you specify the names of the user-defined Individual pull-down list fields as well as the data contained in these pull-down lists. The name you specify will be utilized for all reports and forms where the user-defined pull-down list fields are displayed.

NOTE: Your church may or may not have use for these user-defined Household fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

"GRADES/SCHOOL" TAB:

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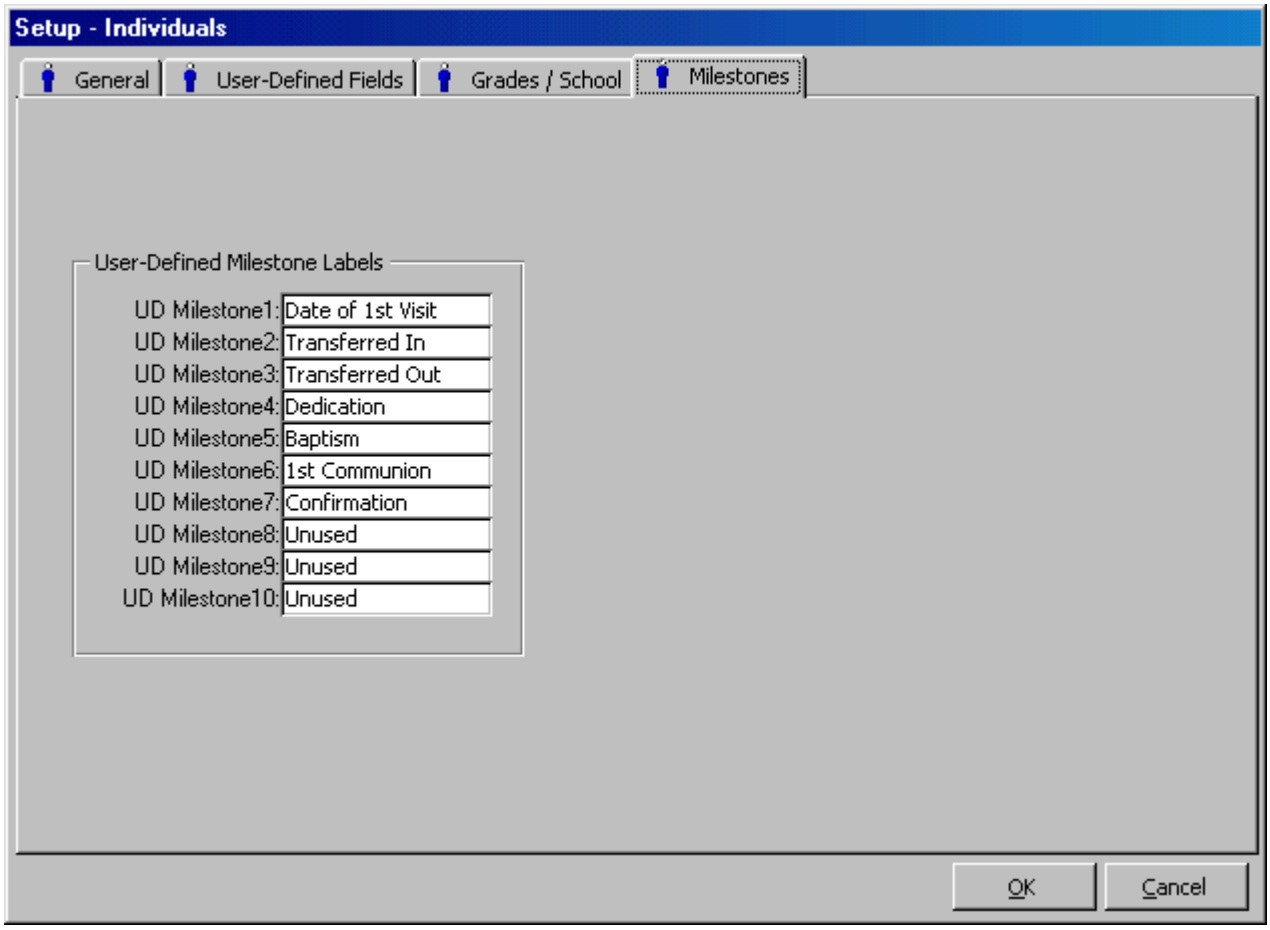


***"Grade Levels"* Section:**
This is where you define the desired grade level structure. Use the Add, Edit, and Delete buttons below the list to manage the Grade Level values. Use the up and down arrow buttons located to the right of the list to order the items as desired.

***"Schools"* Section:**
This is where you define the values found in the School pull-down control on the General tab of the Individual Detail form.

"MILESTONES" TAB:

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***"User-Defined Milestone Labels"* Section:**
This is where you define the labels of the 10 user-definable milestone events (found on the Milestone tab of the Individual Detail form). These labels will be utilized where the milestones are displayed (ie. forms, reports, etc.).

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

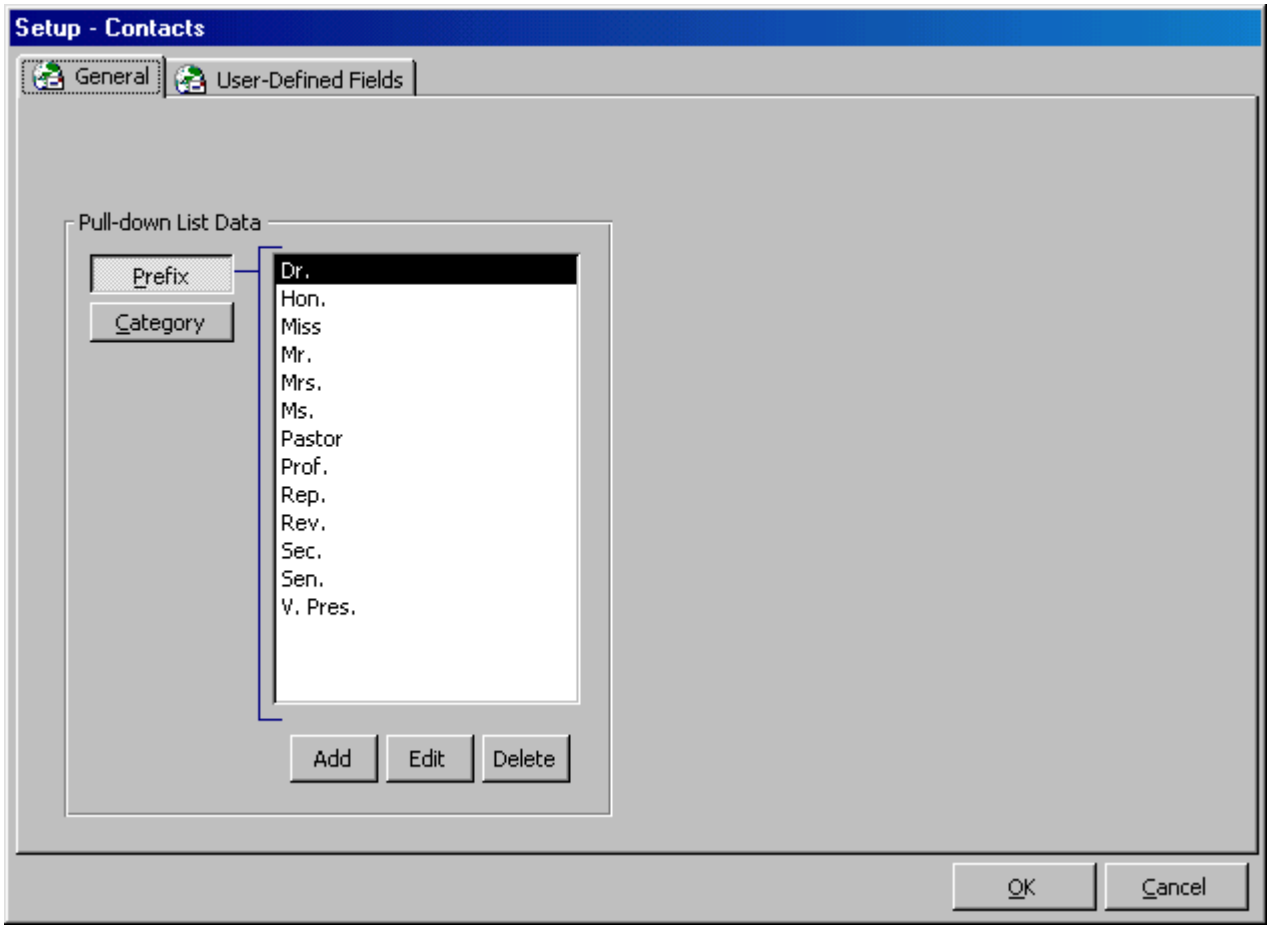
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3.5 Contacts Setup

(Chapter 3 - Setup & Preferences)

To reach the Contacts Setup screen, select "Setup & Preferences | Contacts Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:

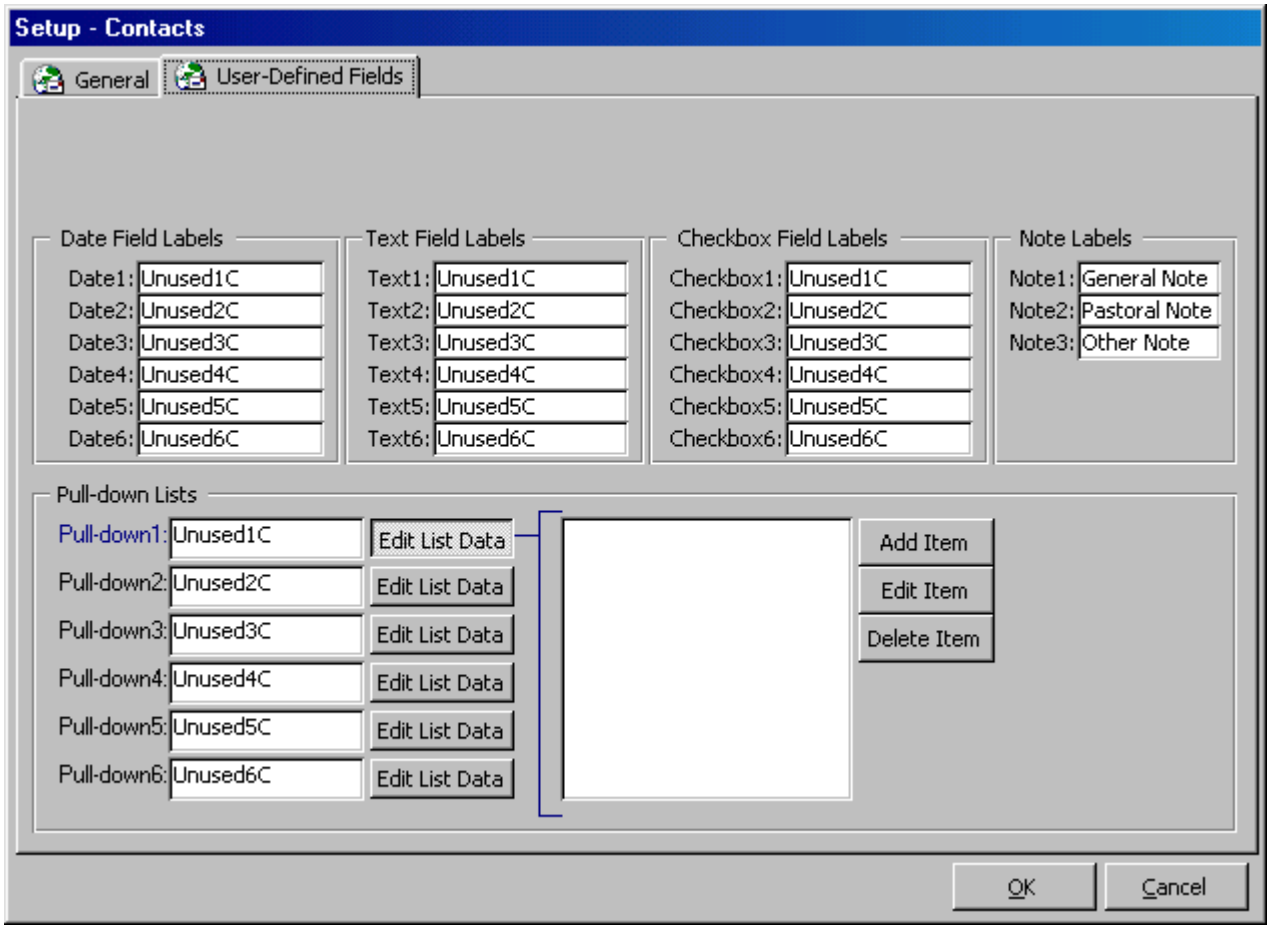


***"Pull-down List Data"* Section:**

Use this section to manage the values contained in the various pull-down lists associated with Individual records.

"USER-DEFINED FIELDS" TAB:

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***"Date Field Labels"* Section:**
This is where you specify the names of the user-defined Contact date fields. The name you specify will be utilized for all reports and forms where the user-defined date fields are displayed.

***"Text Field Labels"* Section:**
This is where you specify the names of the user-defined Contact text fields. The name you specify will be utilized for all reports and forms where the user-defined text fields are displayed.

***"Checkbox Field Labels"* Section:**
This is where you specify the names of the user-defined Contact checkbox fields. The name you specify will be utilized for all reports and forms where the user-defined checkbox fields are displayed.

***"Note Labels"* Section:**
This is where you specify the names of the 3 Contact-based note fields.

***"Pull-Down Lists"* Section:**
This is where you specify the names of the user-defined Contact pull-down list fields as well as the data contained in these pull-down lists. The name you specify will be utilized for all reports and forms where the user-defined pull-down list fields are displayed.

NOTE: Your church may or may not have use for these user-defined Contact fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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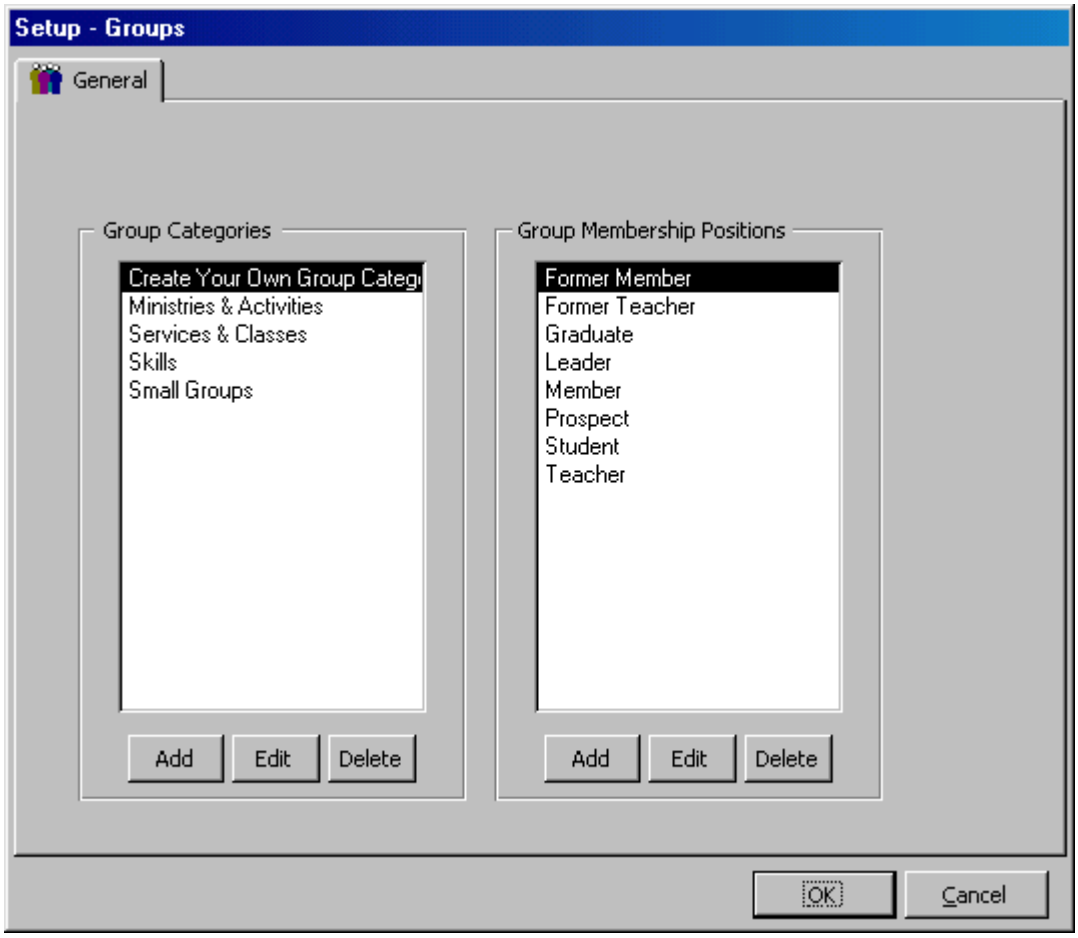
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3.6 Groups Setup

(Chapter 3 - Setup & Preferences)

To reach the Groups Setup screen, select "Setup & Preferences | Groups Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:



***"Group Categories"* Section:**
Use this section to manage the list of available Group "Categories" when entering and modifying Group records.

***"Group Membership Positions"* Section:**
Use this section to manage the list of available membership "Positions" (or roles) when assigning and modifying Group Membership records.

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

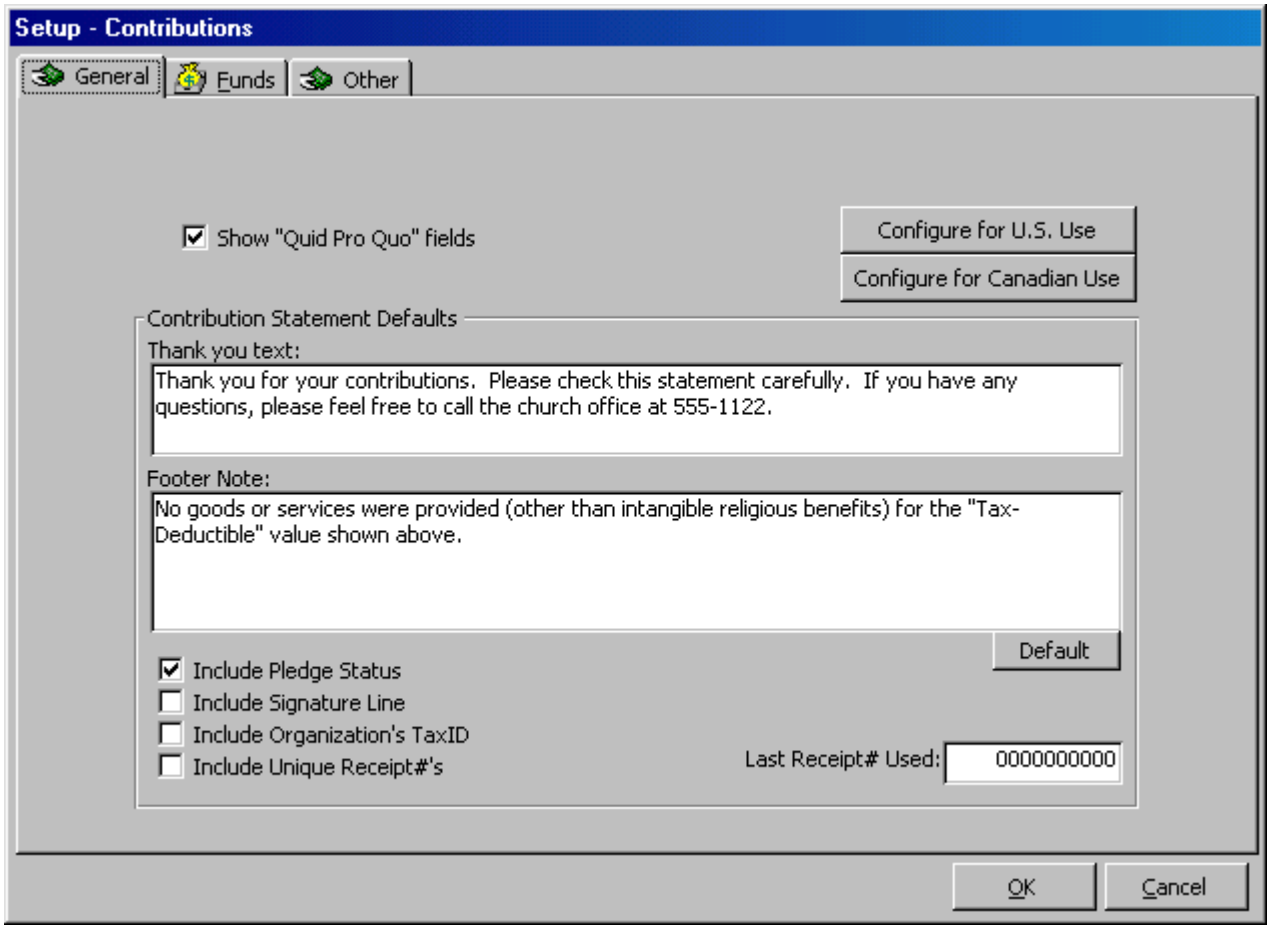
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3.7 Contributions Setup

(Chapter 3 - Setup & Preferences)

To reach the Contributions Setup screen, select "Setup & Preferences | Contributions Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:


Setup - Contributions
General
Funds
Other
Show "Quid Pro Quo" fields
Configure for U.S. Use
Configure for Canadian Use
Contribution Statement Defaults
Thank you text:
Thank you for your contributions. Please check this statement carefully. If you have any questions, please feel free to call the church office at 555-1122.
Footer Note:
No goods or services were provided (other than intangible religious benefits) for the "Tax-Deductible" value shown above.
Default
Include Pledge Status
Include Signature Line
Include Organization's TaxID
Include Unique Receipt#'s
Last Receipt# Used:
0000000000
OK
Cancel

***"Show 'Quid Pro Quo' fields"*:**
Use this checkbox to indicate whether or not the CH2002 program should utilize the "Quid Pro Quo" contribution fields. "Quid Pro Quo" is a latin term that refers to the good faith estimate of the value of the goods or services that the contributor received in return for their contribution. The United States IRS does not consider the Quid Pro Quo portion of a contribution to be tax deductible.

For example, let's suppose the youth group at your church sponsored a Valentine's Day dinner dance and sold ticket's for $50 per couple. The ticket sales from the dance is going to be used to help with the construction costs of the your church's youth center. If you estimate the value of the dinner to actually be $30 (the Quid Pro Quo value), then the actual tax deductible amount that the contributor could claim as a charitable contribution on his/her tax return would be $50 - $30 = $20 (total contribution - Quid Pro Quo value).

If you do not wish to utilize the Quid Pro Quo fields in your Contribution entry, screen displays, and reports, uncheck this checkbox.

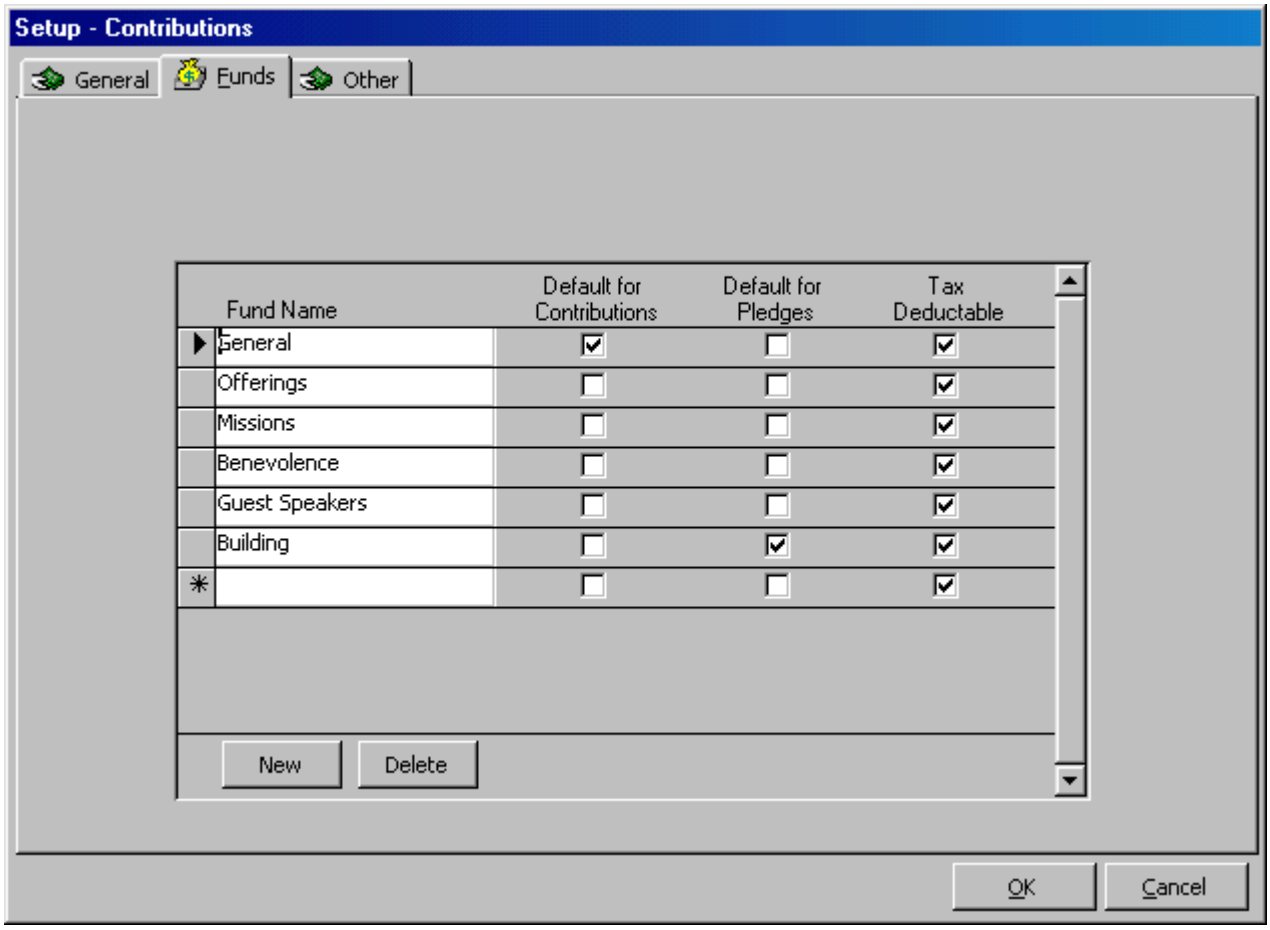
***"Contribution Statement Defaults"*:**
Use this section to configure defaults for several fields related to the Contribution Statement Configurator. These are only

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defaults and the actual values can be altered at the time the statements are generated.

You can use the "Configure for U.S. Use" and "Configure for Canadian Use" buttons in the upper right-hand section of the General tab to have the program automatically set the various contribution-related settings to match the standard configurations for usage in the United States or Canada.

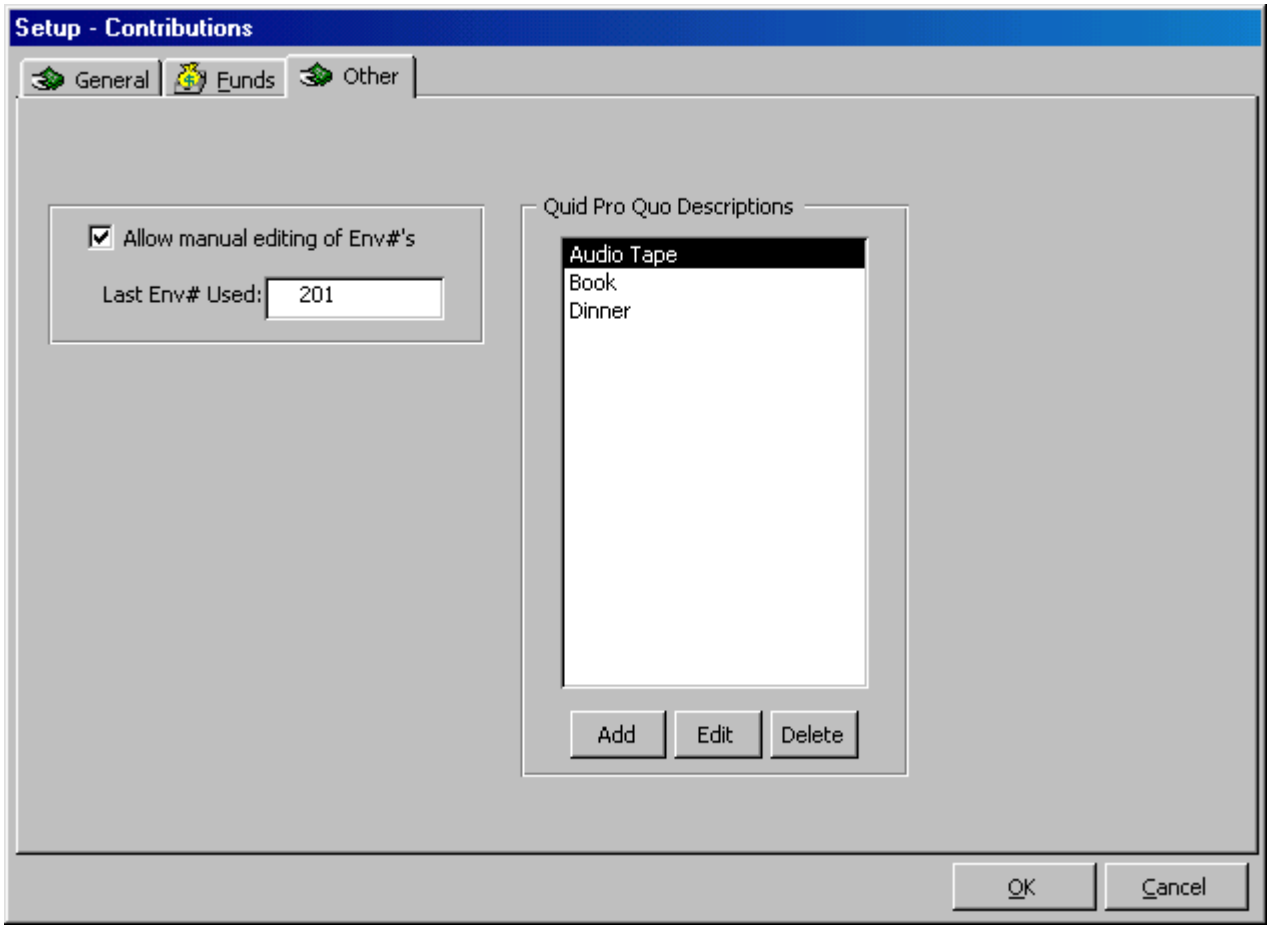
"FUNDS" TAB:



This is where you can define the Contribution Funds for Contribution and Pledge record designation. CH2002 database includes several sample funds. These funds can be utilized, modified, and/or deleted by the user. You'll want to designate a default fund for Contributions and a default fund for Pledges. In addition, you'll want to designate which funds are tax deductible and which are not.

"OTHER" TAB:

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***"Allow Manual Editing of Env#'s"*:**
Use this checkbox to indicate whether or not the user should be permitted to manually type in the Envelope# field value for Households, Individuals, and Contacts. If this checkbox is not checked, the user must use the button to the right of the Envelope# field which automatically assigns the Household, Individual, or Contact the next available number.

***"Last Env# Used"*:**
The program keeps track of the last envelope number given to Household, Individual, and/or Contact records using the automatic env# assignment function. Normally no adjustment will need to be made to this value. However, the user can alter the last Env# used value here if necessary.

***"Quid Pro Quo Descriptions"*:**
Allows the user to manage the values found in the Quid Pro Quo Description pull-down control on the Contribution Batch Detail Form.

TIP: A fund cannot be deleted if there are Contribution records associated with the fund. In this case, you would need to either first delete the Contribution records made to the fund or move the Contribution records to another fund.

TIP: Care should be taken when renaming an existing fund name. Renaming a fund which has existing Contribution records associated with it will change the fund name for all of these existing Contributions made to that fund. For example, let's say on Monday you had a fund named "General" and you entered in 10 Contribution records and assigned them to this fund. Then on Tuesday, you renamed this fund to the "Building Fund". The 10 Contribution records you entered on Monday now appear on the screen and in reports to be assigned to the "Building Fund". To prevent this confusion, you should typically always create new fund records when introducing a new fund rather than renaming an existing one.

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TIP: If you are using the CH2002 / QuickBooks export/import functionality, you'll need to be certain that the spelling of your CH2002 funds matches the spelling of your associated income accounts in QuickBooks.

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

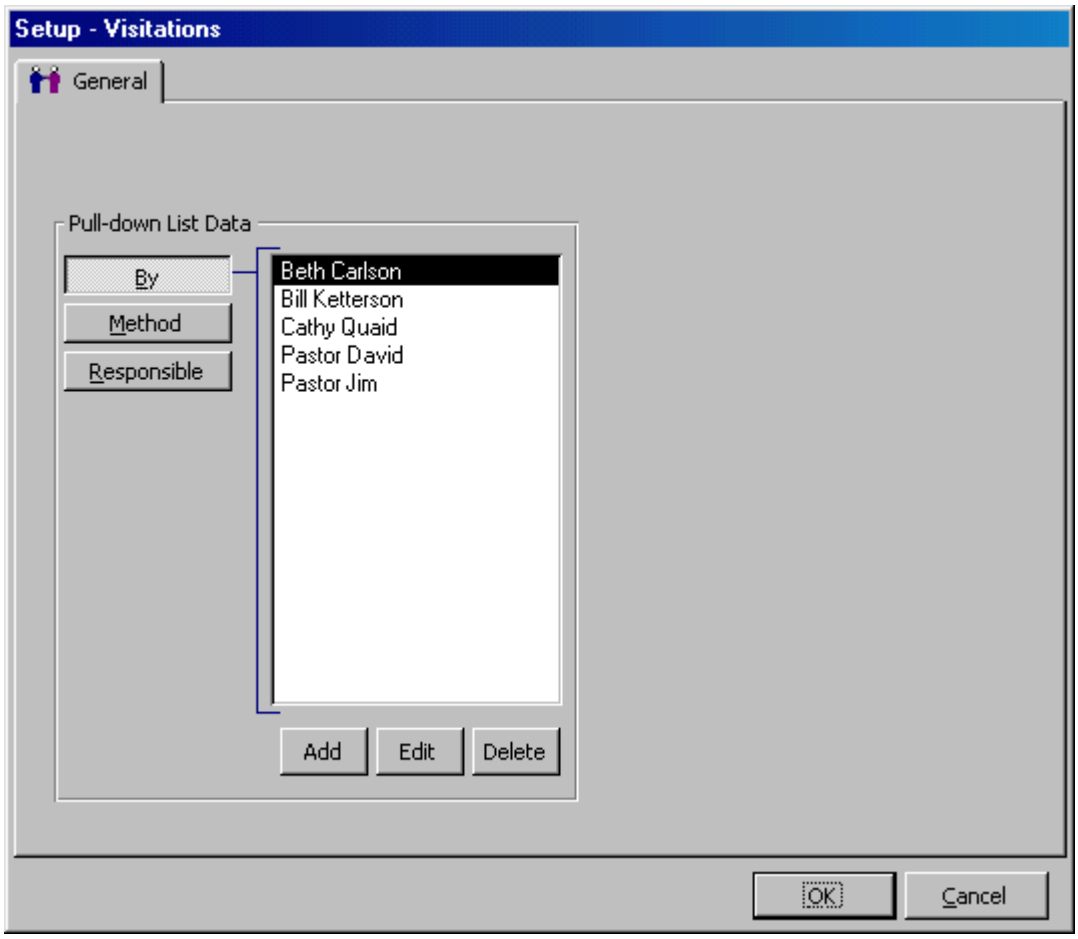
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3.8 Visitations Setup

(Chapter 3 - Setup & Preferences)

To reach the Visitations Setup screen, select "Setup & Preferences | Visitations Setup" from the CH2002 main menubar or Navigation Menu.

"GENERAL" TAB:



***"Pull-down List Data"* Section:**
Use this section to manage the values contained in the various pull-down lists associated with Visitation records.

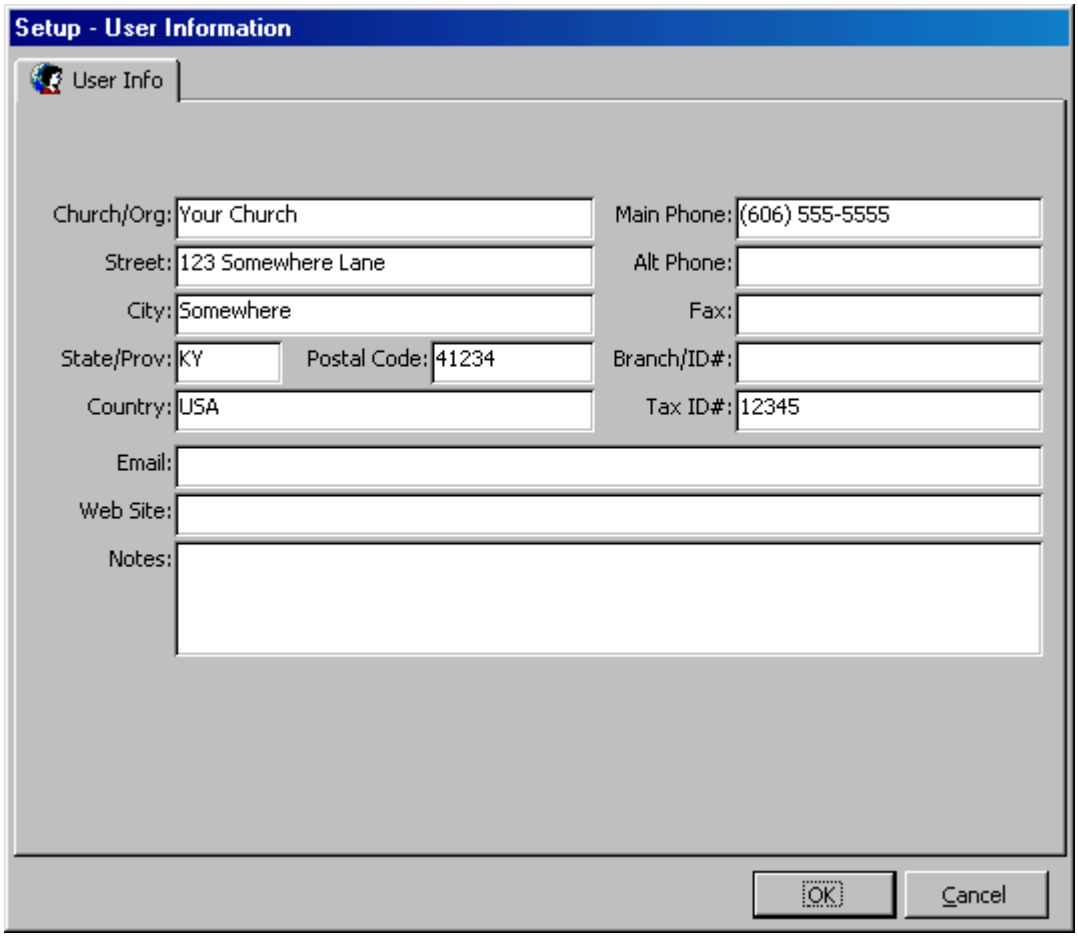
TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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3.9 User Information Setup

(Chapter 3 - Setup & Preferences)

To reach the User Information Setup screen, select "Setup & Preferences | User Information Setup" from the CH2002 main menubar or Navigation Menu.



The fields here record essential information about your church or organization. You can utilize as many or as few of these fields as you wish. The most important fields are the Church/Org, Street, City, State/Prov, and Postal Code fields as they are used as the return address on statement reports.

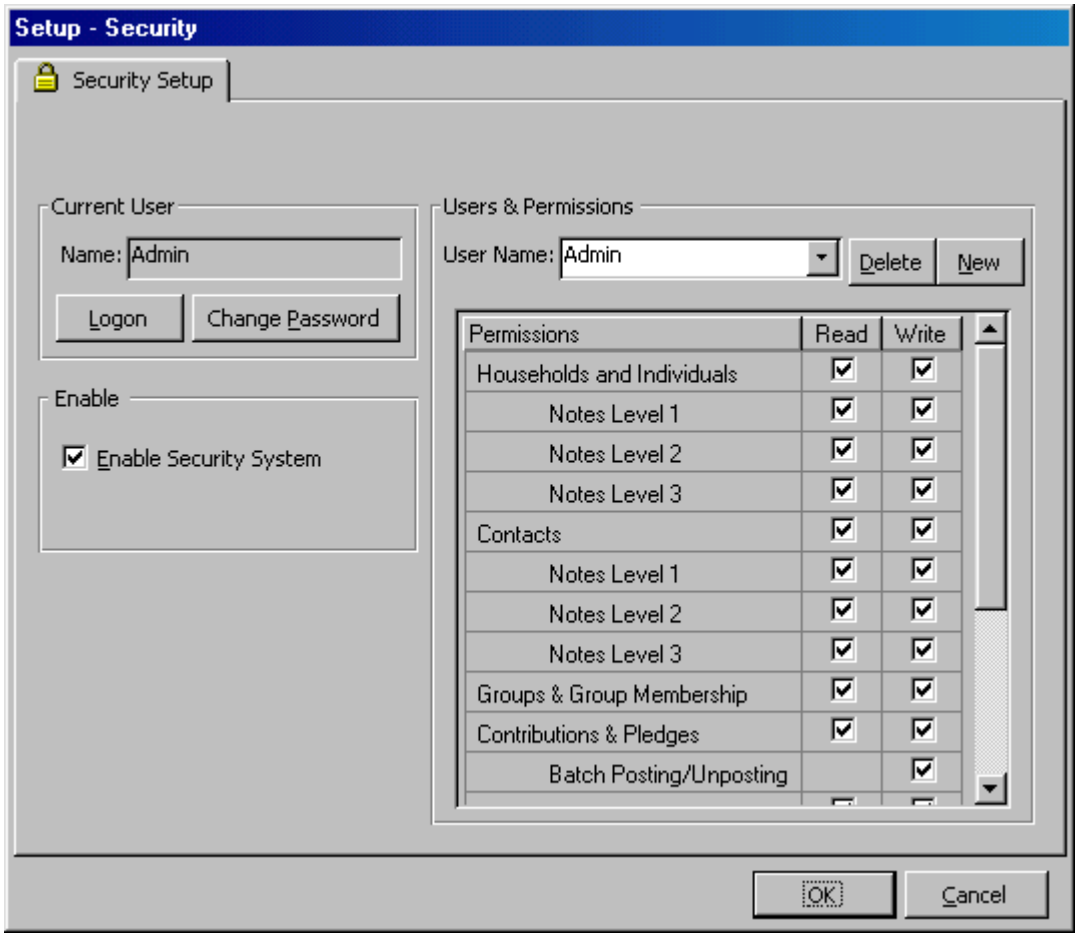
TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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3.10 Security System Setup

(Chapter 3 - Setup & Preferences)

To reach the Security System Setup screen, select "Setup & Preferences | Security System Setup" from the CH2002 main menubar or Navigation Menu.



From the Security System Setup screen, you can:

- Enable/disable the security system
- Logon to or logoff of the system
- Define user names and set passwords
- Define the security permissions for each user name

***"Current User"* Section:**

The "Name" field will display the name of the current logged on user. If no user is currently logged on, this will be indicated as well. Use the "Logon" button to open the "Logon" dialog box and logon to the security system (see Logging Onto the Security System). Use the "Change Password" button to change the password of the current logged on user (see Assigning User Passwords).

***"Enable"* Section:**

- Use the "Enable Security System" checkbox to enable or disable the CH2002 Security System. Only logged on users with "Administrate" permissions will be allowed to change the state of this checkbox.
- When this checkbox is checked, the CH2002 Security System will be active. When the system is active, security checks will be implemented to administrate access to the various modules of the application. For example, if the current logged on user only has Read permissions to the Contributions & Pledges module, they will be prevented from modifying

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any contribution or pledge related records in the database. In addition, the security system's Logon dialog box will be displayed upon application startup (forcing a user logon before using the application).

- When this checkbox is unchecked, the CH2002 Security System is disabled. When disabled, no security checks are made and the initial Logon dialog box is not shown during application startup.

***"Users & Permissions"* Section:**

In this section, you will define and configure the various user names for you and others that will be using the CH2002 application. If you do not plan on enabling the CH2002 Security System, then there is no need to setup anything in this section. If you plan on utilizing the CH2002 Security System, then you'll want to determine what User Names to create. You may choose to create an individual User Name for every person that may use the CH2002 application (i.e. Bob, Mary, Susan, etc.), or you may choose to create User Names which represent groups of people who will have similar security permissions (i.e. Pastor, Secretary, Volunteer, etc.).

Use the "User Name" pull-down list to change the displayed User Name. Use the "Delete" button to delete the currently displayed User Name. Use the "New" button to add a new user name. User the security permissions table to view and/or assign permissions for the currently displayed User. These security permissions cannot be modified unless a User with Administrate permissions is currently logged on.

Additional Security System Notes:

- CH2002 includes 2 default User Names upon installation: "Admin" and "Guest". The Admin user has full read/write permissions while the Guest user has limited permissions. The initial passwords for the Admin and Guest users are blank (no characters).

- The CH2002 Security System is an "application level" security system. It will provide basic security protection of your church's data from individuals using the application. It will not, however, provide data security against experienced programmers who may be able to obtain access to the CH2002 data tables using Microsoft Access or other database applications able to read MS Access-based tables.

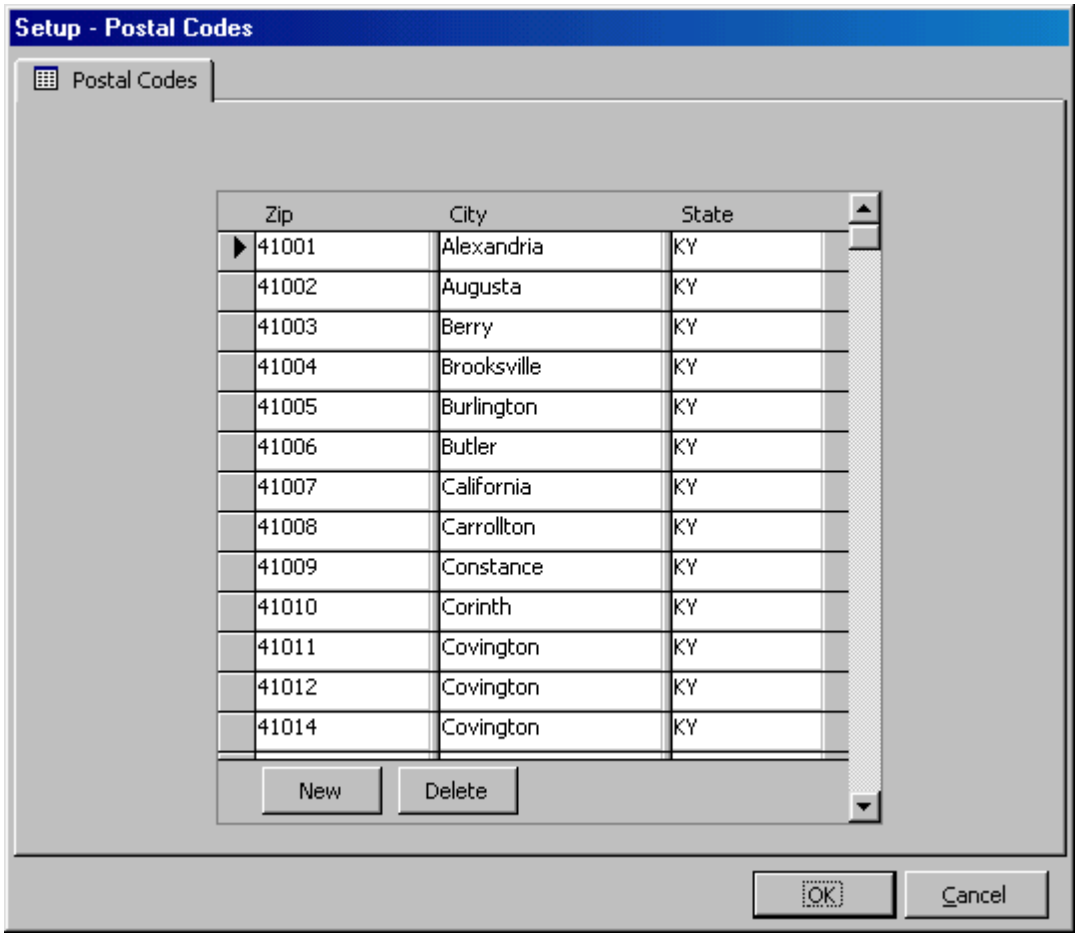
TIP: These settings are global settings in that they affect all computers sharing the same CH2002 data file.

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3.11 Postal Code Lookup Table Setup

(Chapter 3 - Setup & Preferences)

To reach the Postal Code Lookup Table Setup screen, select "Setup & Preferences | Postal Code Lookup Table Setup" from the CH2002 main menubar or Navigation Menu.



This is where you can define a Postal Code lookup table to speed-up the data entry process when entering in new Household and Contact records. Here, you define the City and State which are associated with a particular Postal Code. When entering new records in the Household Detail Form or the Contact Detail Form, you can enter in the Postal Code and the form will automatically fill in the City and State fields if you've defined the Postal Code in this lookup table.

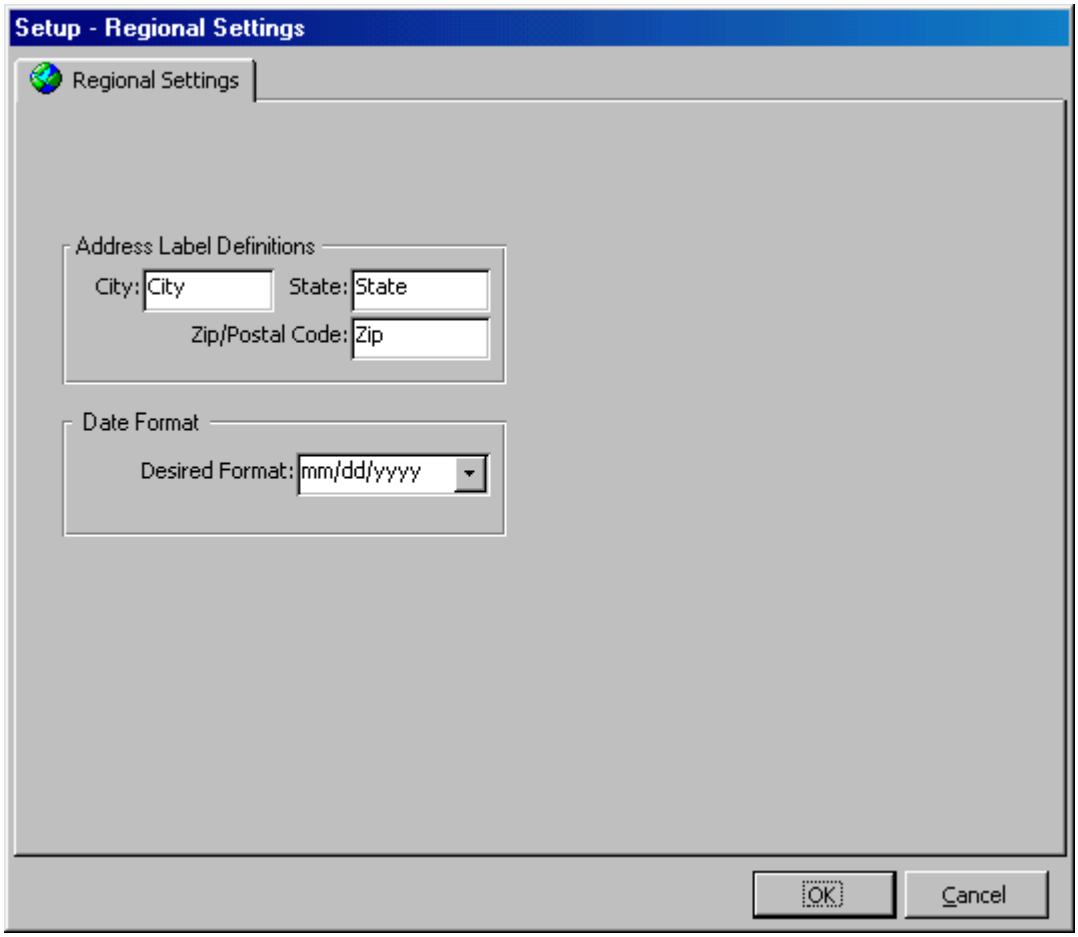
TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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3.12 Regional Settings

(Chapter 3 - Setup & Preferences)

To reach the Regional Settings Setup screen, select "Setup & Preferences | Regional Settings" from the CH2002 main menubar or Navigation Menu.



The settings found on the Regional Setting screen allow the user to configure the CH2002 product to conform to their regional formatting and display of various data. For example, in the U.S., the term "Zip Code" is utilized. In Canada, the term "Postal Code" is used instead.

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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3.13 Network/Multi-User Setup

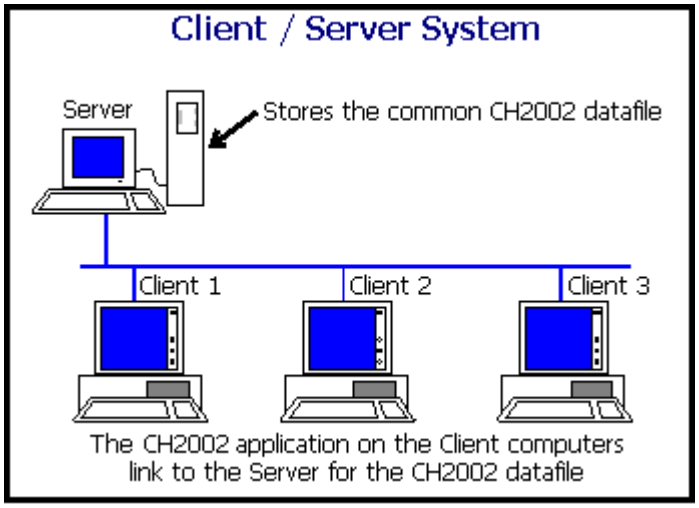
(Chapter 3 - Setup & Preferences)

The CH2002 can be used in a stand-alone, single-computer environment or in a networked, multi-computer environment. Using CH2002 in a multi-computer environment, enables multiple users to run the CH2002 program from their own computer allowing access to the common CH2002 datafile simultaneously with other users.

There are 2 main categories of network systems - Client/Server and Peer-to-Peer. These 2 systems are depicted in the diagrams below. In either system, you must choose a location for a common CH2002 datafile to be shared by all computers running the CH2002 application. The computer or server which stores the common CH2002 datafile will be referred to as the "CH2002 Data Server".

In the Client / Server System, the Server should be utilized as the CH2002 Data Server. In the case of a Peer-to-Peer system, any client computer can be used as the CH2002 Data Server. We normally recommend selecting the client computer which will most often use the CH2002 application as the CH2002 Data Server in a Peer-to-Peer system.

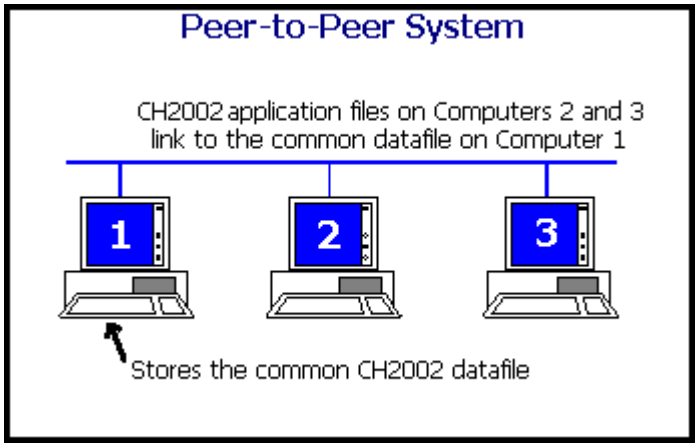
To setup CH2002 to function in a Client / Server system:



- Install the CH2002 application onto each of the client computers
- From any of the client computers, copy the CH2002 datafile onto the server. The default CH2002 datafile filename is "CH2002data.mdb" and it is located in the CH2002 folder on the client computer's hard-drive (default location is "C:\Program Files\CH2002"). Make sure that this CH2002 datafile has been copied onto the server in such a manner that it is readable and writable by all client computers.
- On each of the client computers, run the CH2002 application and select "File | Open Data File" from the program's main menubar and specify the CH2002 datafile located on the Server.

To setup CH2002 to function in a Peer-to-Peer system:

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- Install the CH2002 application onto each of the computers
- Select one of the computers to be the CH2002 Data Server. For this example, we'll select "Computer 1" as the CH2002 Data Server. "Computer 2" and "Computer 3" will then be considered CH2002 Data Clients. Make sure that the CH2002 datafile located on Computer 1 is readable and writable by all CH2002 Data Client computers by setting up the necessary file sharing options.
- On each of the CH2002 Data Client computers, run the CH2002 application and select "File | Open Data File" from the program's main menubar and specify the CH2002 datafile located on the CH2002 Data Server (Computer 1).

TIP: When choosing a CH2002 Data Server in a Peer-to-Peer system, the general rule is to select the computer which will be most often used to run the CH2002 application. CH2002 performance will be best on the CH2002 Data Server computer since the datafile is local to that computer. Accessing the CH2002 datafile across the network is slower than accessing it from a local hard-drive. There may be other factors involved in the selection of the CH2002 Data Server computer such as free hard-drive space to store the datafile, performance/speed of the computer, etc.

TIP: These settings are global settings in that they affect ALL computers sharing the same CH2002 data file.

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Chapter 4

4 Chapter 4 - Households & Individuals

4.1 Chapter 4 - Households & Individuals

Chapter 4 Sections:

- Households Explorer
- Household Detail Form
- Individuals Explorer
- Individual Detail Form
- Household & Individual Procedures

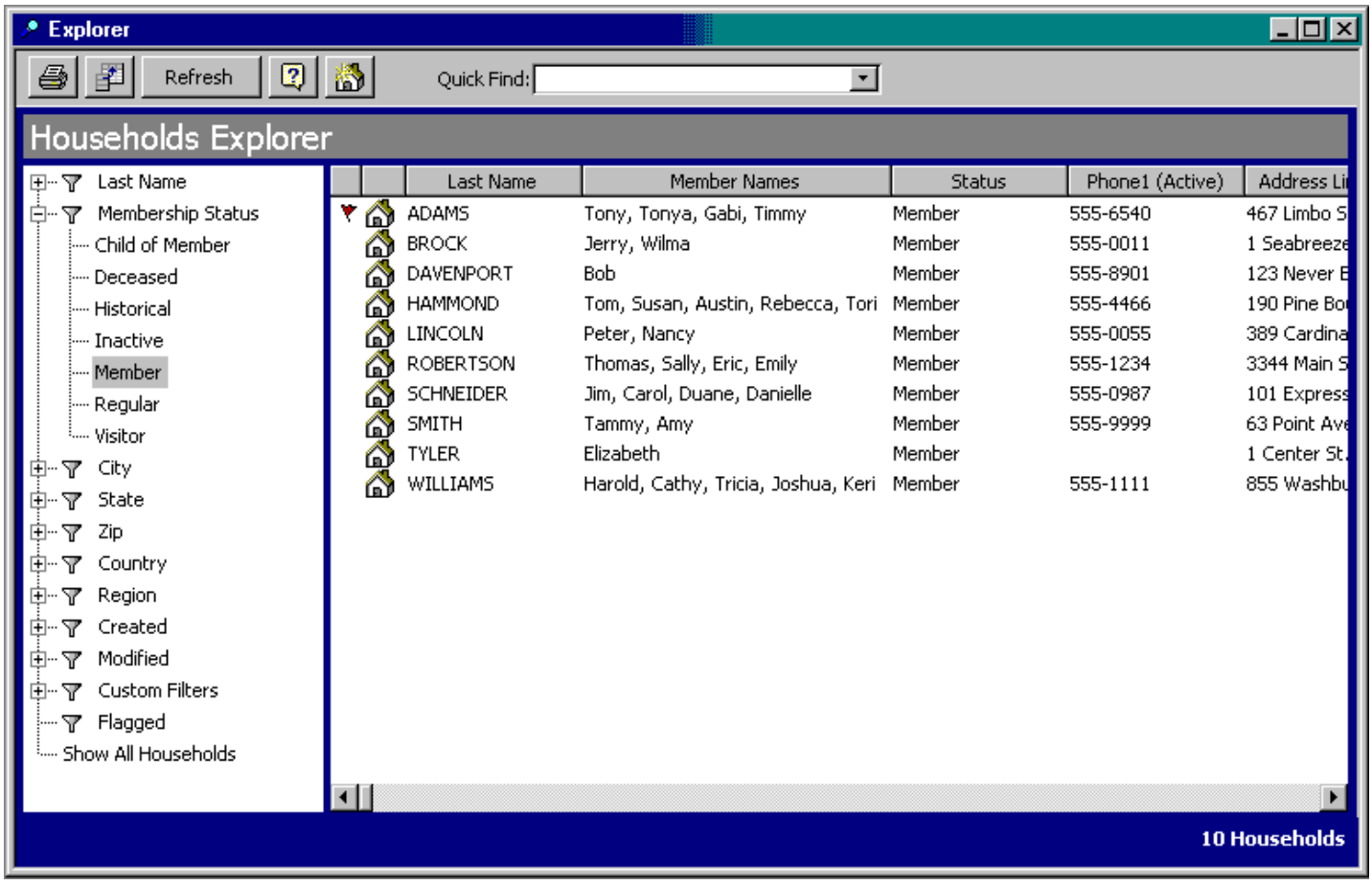
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4.2 Households Explorer

(Chapter 4 - Households & Individuals)

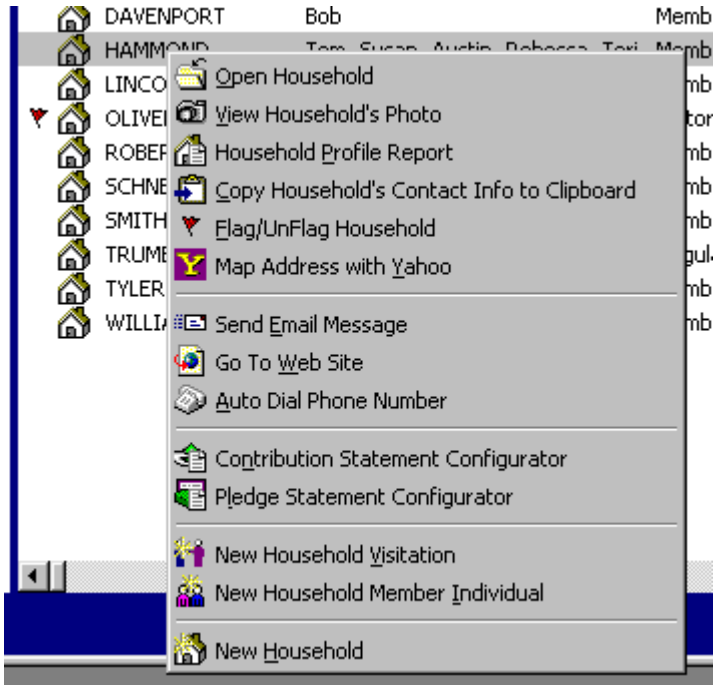
To reach the Households Explorer, select "Explorer Views | Households Explorer" from the program's main menubar or from the Navigation Menu.

The Households Explorer provides you a powerful visual representation of the Household records contained within your database. The Households Explorer view is made up of 2 parts: the TreeView filter component on the left and the ListView data component on the right as shown below:



You can use the TreeView filter to filter exactly which Household records are displayed in the ListView Data display. The image above shows how the display can be filtered to include only Households with Membership Status of "Member". Right-clicking a Household's record from the ListView Data control will display a useful menu as shown below:

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TIP: Double-clicking a Household item will open the Household's record in the Household Detail Form (which is equivalent to the menu item "Open Household" from the right-click pop-up menu).

TIP: As with all of the CH2002 Explorer Views, the Households Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Household Detail Form .

TIP: The "Quick Find" pull-down control in the toolbar section of the Explorer provides a method of locating a household in the Household Explorer's ListView control. Select the desired household from the Quick Find pull-down either by using the mouse or by simply beginning to enter in the Household's last name into the pull-down control and then pressing the <ENTER> key on your keyboard. To quickly place the cursor in the Quick Find control, simply press the "F" key (for "Find") from anywhere in the Households Explorer.

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4.3 Household Detail Form

4.3.1 Household Detail Form

(Chapter 4 - Households & Individuals)

To reach the Household Detail Form:

- Select "Detail Views | Household Detail Form" from the program's main menubar or from the Navigation Menu.

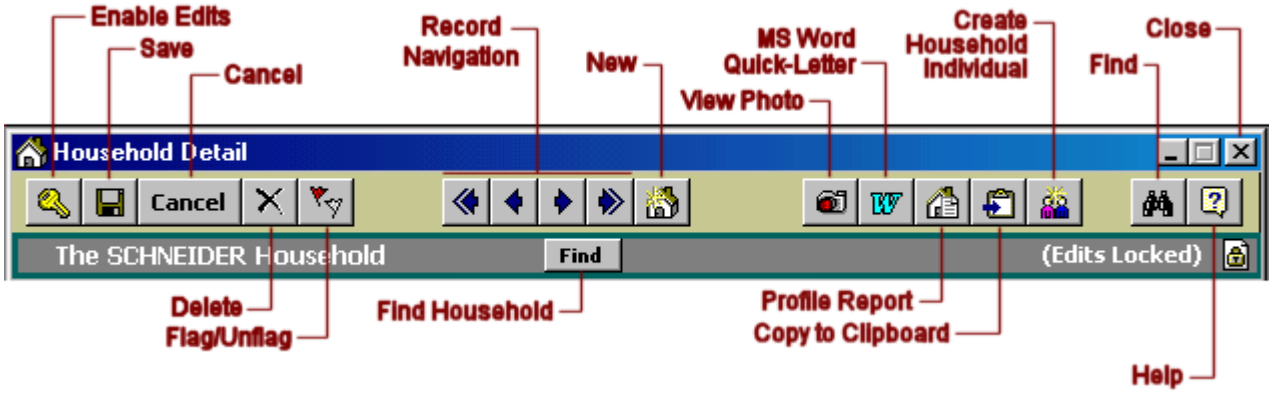
OR

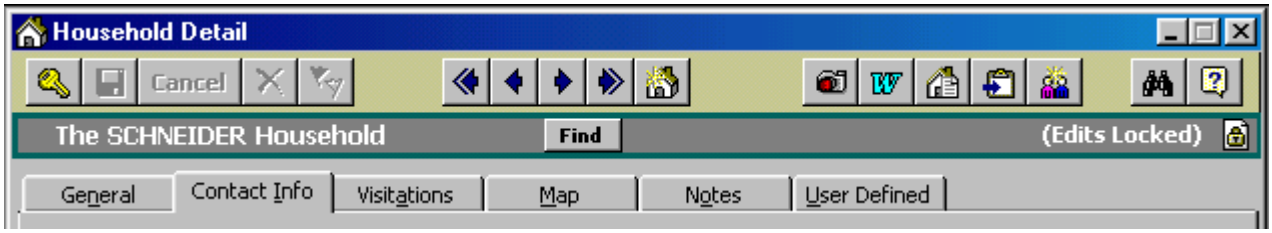
- From the Households Explorer, either double-click on a household from the right-hand side ListView control or choose "Open Household" from the Household Explorer's right-click pop-up menu.

The Household Detail Form is used to manage Household records. This form will enable you to:

- Add new Household records
- Edit/Update Household records
- View Household details
- Delete Household records

The Household Detail Form's toolbar is shown below:





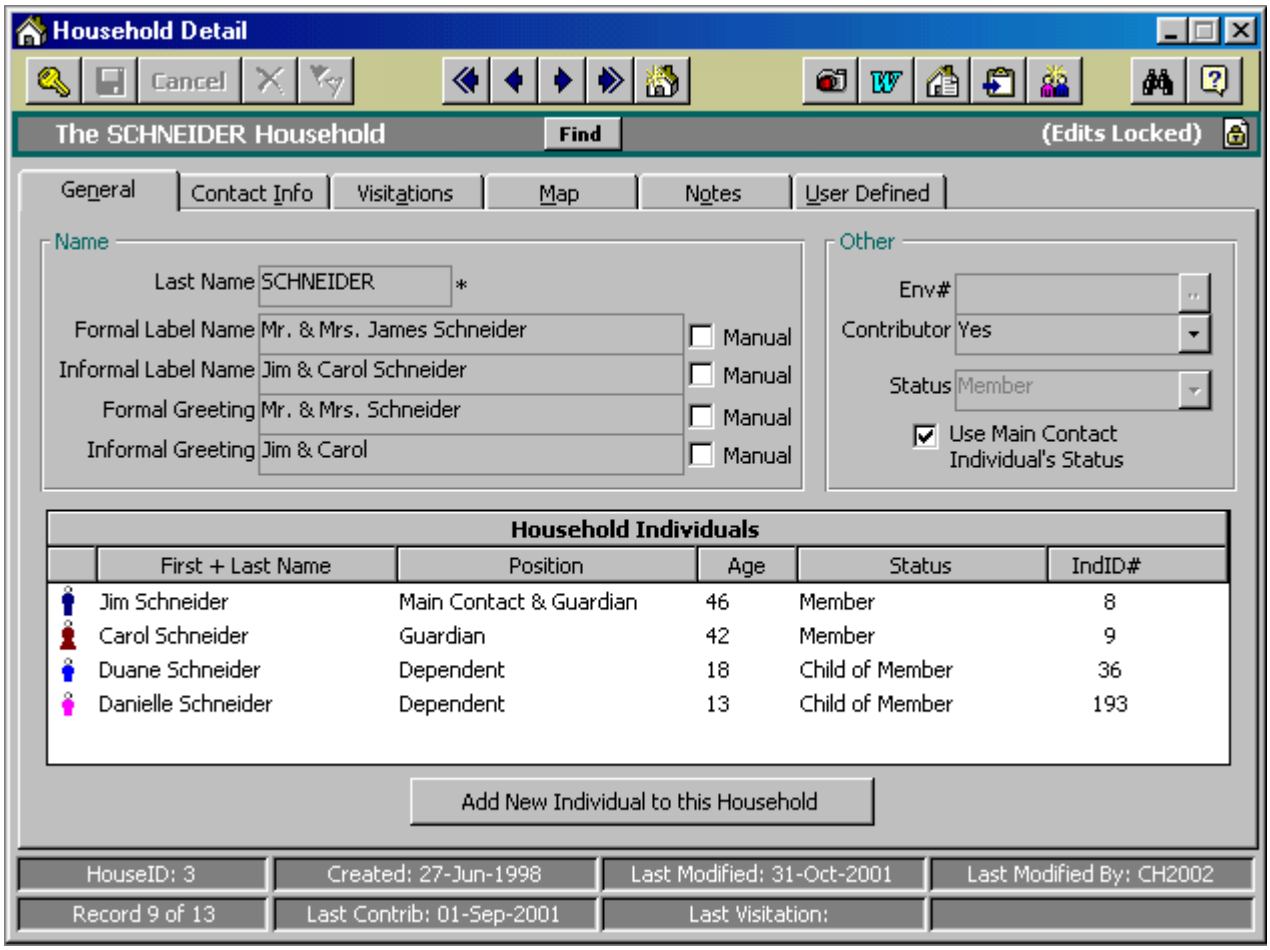
As shown above, the Household Detail Form is divided into the following "tabs" (sections):

"General" Tab, "Contact Info" Tab, "Visitations" Tab, "Map" Tab, "Notes" Tab, "User-Defined" Tab

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4.3.2 Household Detail Form - "General" Tab

(Chapter 4 - Households & Individuals)


Household Detail
Cancel
The SCHNEIDER Household
Find
(Edits Locked)
General
Contact Info
Visitations
Map
Notes
User Defined
Name
Last Name SCHNEIDER *
Formal Label Name Mr. & Mrs. James Schneider Manual
Informal Label Name Jim & Carol Schneider Manual
Formal Greeting Mr. & Mrs. Schneider Manual
Informal Greeting Jim & Carol Manual
Other
Env#
Contributor Yes
Status Member
Use Main Contact Individual's Status
Household Individuals
First + Last Name | Position | Age | Status | IndID#
Jim Schneider | Main Contact & Guardian | 46 | Member | 8
Carol Schneider | Guardian | 42 | Member | 9
Duane Schneider | Dependent | 18 | Child of Member | 36
Danielle Schneider | Dependent | 13 | Child of Member | 193
Add New Individual to this Household
HouseID: 3
Created: 27-Jun-1998
Last Modified: 31-Oct-2001
Last Modified By: CH2002
Record 9 of 13
Last Contrib: 01-Sep-2001
Last Visitation:

***"Name"* Section:**

This is where you record basic name information of the Household. The Label Name and Greeting fields can either be generated automatically (by combining the names of the Household Guardian individuals) or the user can check the appropriate "Manual" checkbox (to over-ride the automatic generation) and specify the exact wording of each these fields.

***"Other"* Section:**

This is where you record additional information on the Household including an Envelope# and Contributor Type. This is also where you indicate the Household's membership status. If you'd like, you can specify that the Household have the same status as the Household's main contact individual by checking the "Use Main Contact's Status" checkbox.

***"Household Individuals"* Section:**

The individual records belonging to this Household are displayed in the ListView control. You can double-click on an Individual's name to open the Individual's detail information - or you can right-click the individual's name for other options. To add a new individual to the Household, use the "Add New Individual to this Household" button.

TIP: Only fields marked with an asterisk ("*") are required fields.

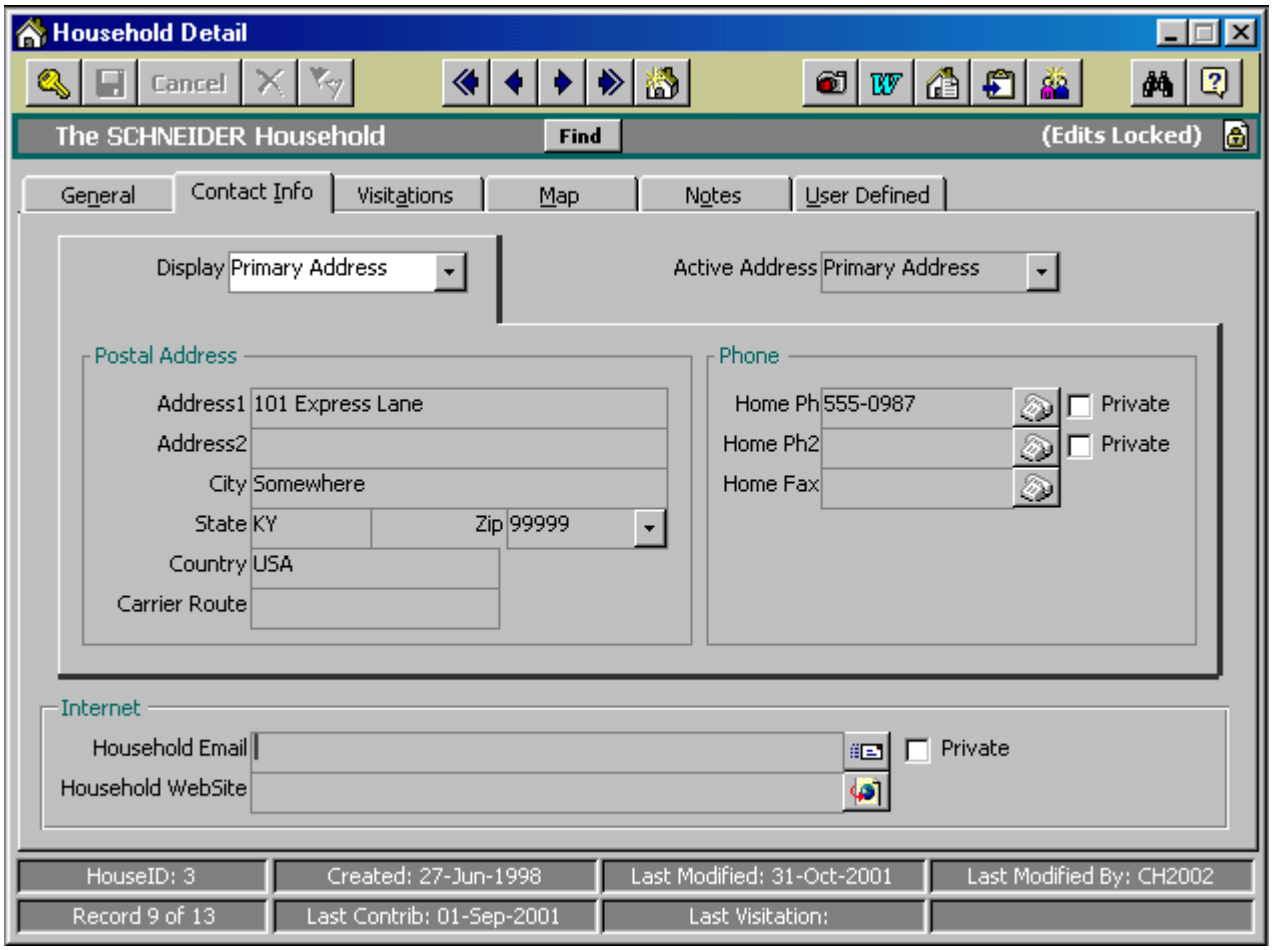
TIP: When entering the Household's last name, you don't need to worry about capitalization - the last name will be stored in ALL CAPS.

TIP: You can assign the Household the next available envelope# by clicking on the button just to the right of the Env# field (button with the dots on it).

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4.3.3 Household Detail Form - "Contact Info" Tab

(Chapter 4 - Households & Individuals)



***"Display"*:**
This control affects which address set (Primary or Secondary) of the Household is displayed.

***"Active Address"*:**
This control allows the user to specify which of the address sets (Primary or Secondary) is to be considered as the active address.

***"Postal Address"* Section:**
This is where you record the Household's postal mail address.

***"Phone"* Section:**
This is where you record the Household's phone numbers. Here you can also specify whether or not the phone numbers should be considered as "Private" (unlisted).

***"Internet"* Section:**
This is where you can record the Household's email address and web site address if they exist.

TIP: None of the fields on this tab are required fields.

TIP: You can setup the Zip/Postal Code lookup table "Setup & Preferences | Postal Code Lookup Table" to have the City and State address fields be automatically filled in when a Zip/Postal Code value is entered (if the Zip/Postal Code value is in the lookup table).

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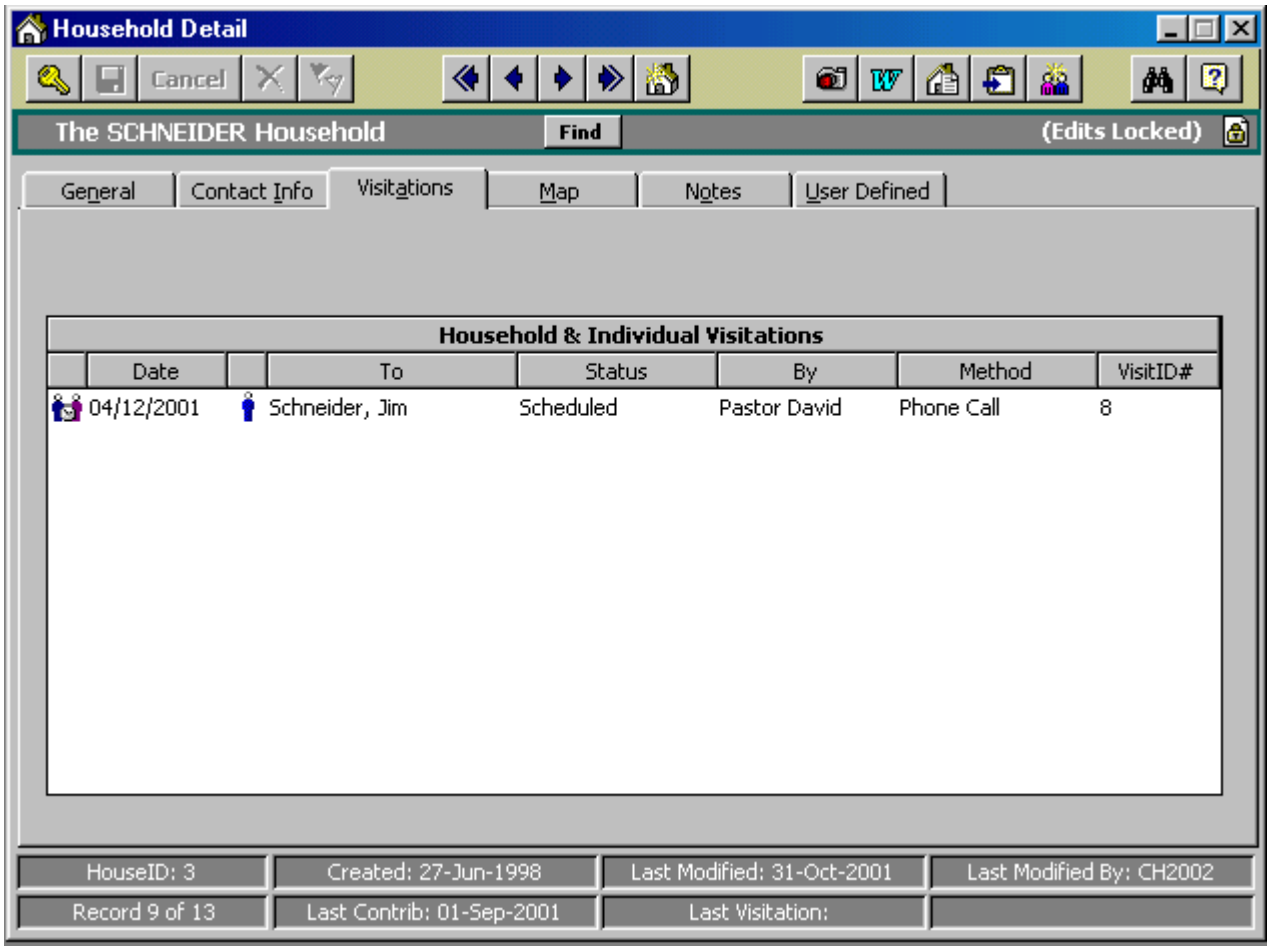
TIP: If your computer is equipped with a modem connected to an active phone line, you can use the dial buttons next to the Household's phone numbers to auto-dial the phone number.

TIP: If your computer is "Internet-enabled", you can use the Email button to the right of the Email field to automatically open your Email software application with the Household's email address already placed in the "To:" field. In the same way, you can use the button to the right of the Web Site field to automatically activate your computer's Web browser with the Household's URL (web address) loaded.

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4.3.4 Household Detail Form - "Visitations" Tab

(Chapter 4 - Households & Individuals)



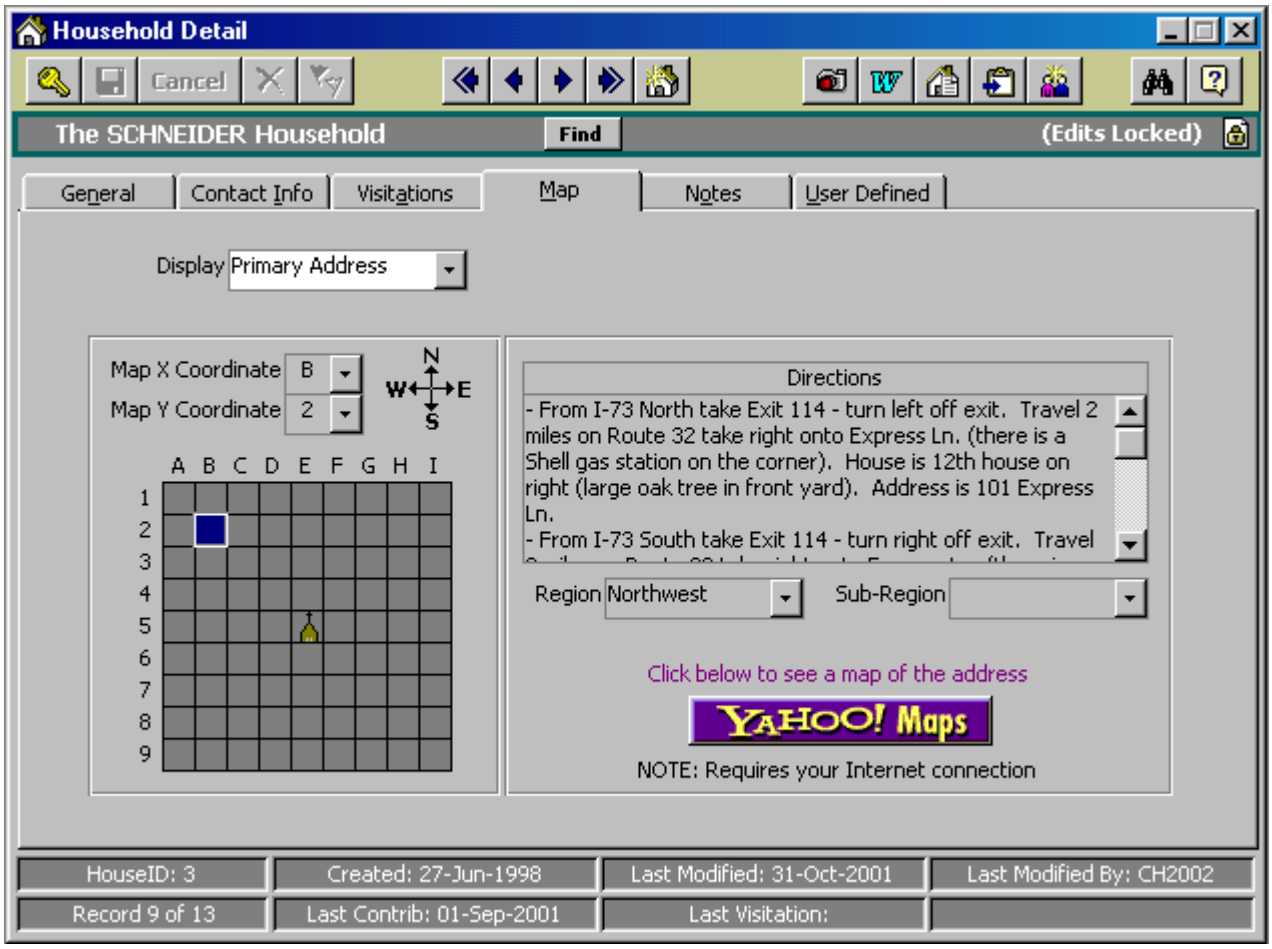
The Visitations Tab contains a ListView control listing all Visitation records associated with the Household or with any of the Household's Individuals. To open the Visitation record, double-click the item from the list. Right-clicking a Visitation item from the list will display a pop-up menu for further options.

TIP: Clicking on the heading of any of the ListView columns will cause the ListView data to be sorted by the this column. Subsequent clicking of the same column heading will toggle between ascending and descending sorts.

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4.3.5 Household Detail Form - "Map" Tab

(Chapter 4 - Households & Individuals)


Household Detail
Cancel
The SCHNEIDER Household
Find
(Edits Locked)
General
Contact Info
Visitations
Map
Notes
User Defined
Display Primary Address
Map X Coordinate B
Map Y Coordinate 2
N
W
E
S
A B C D E F G H I
1 2 3 4 5 6 7 8 9
Directions
- From I-73 North take Exit 114 - turn left off exit. Travel 2 miles on Route 32 take right onto Express Ln. (there is a Shell gas station on the corner). House is 12th house on right (large oak tree in front yard). Address is 101 Express Ln.
- From I-73 South take Exit 114 - turn right off exit. Travel
Region Northwest
Sub-Region
Click below to see a map of the address
YAHOO! Maps
NOTE: Requires your Internet connection
HouseID: 3
Created: 27-Jun-1998
Last Modified: 31-Oct-2001
Last Modified By: CH2002
Record 9 of 13
Last Contrib: 01-Sep-2001
Last Visitation:

Here you can record details about the location of the Household's address. You can use the map grid to provide a quick visual indication of where the Household is located relative to the church. To mark the Household's location on the map (the blue square), click on the desired grid location or select the X,Y location using the "Map X Coordinate" and "Map Y Coordinate" pull-down lists (form must first be in Edit Mode).

Here you can also record detailed directions on how to reach the Household's residence.

If you've got access to the Internet, you can use the "Yahoo! Maps" button to activate our built-in interface with Yahoo's Internet web site to provide "online" mapping of the current Household's address.

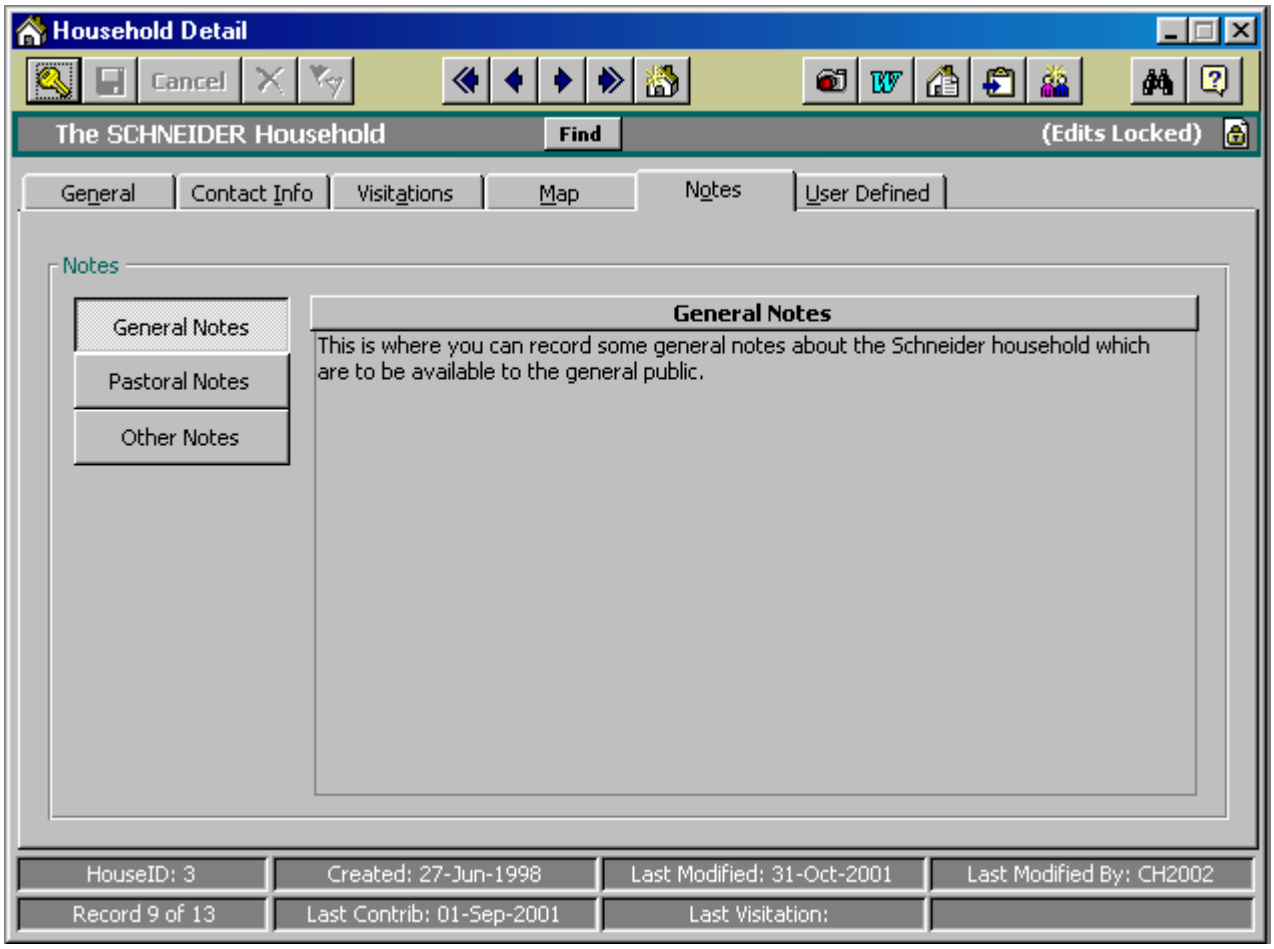
TIP: None of the fields on this tab are required fields.

TIP: Each Household has 2 sets of address information (Primary and Secondary). Therefore there are 2 sets of map information. Select "Primary Address" or "Secondary Address" from the "Display" control at the top of the Map Tab to display the desired address set.

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4.3.6 Household Detail Form - "Notes" Tab

(Chapter 4 - Households & Individuals)



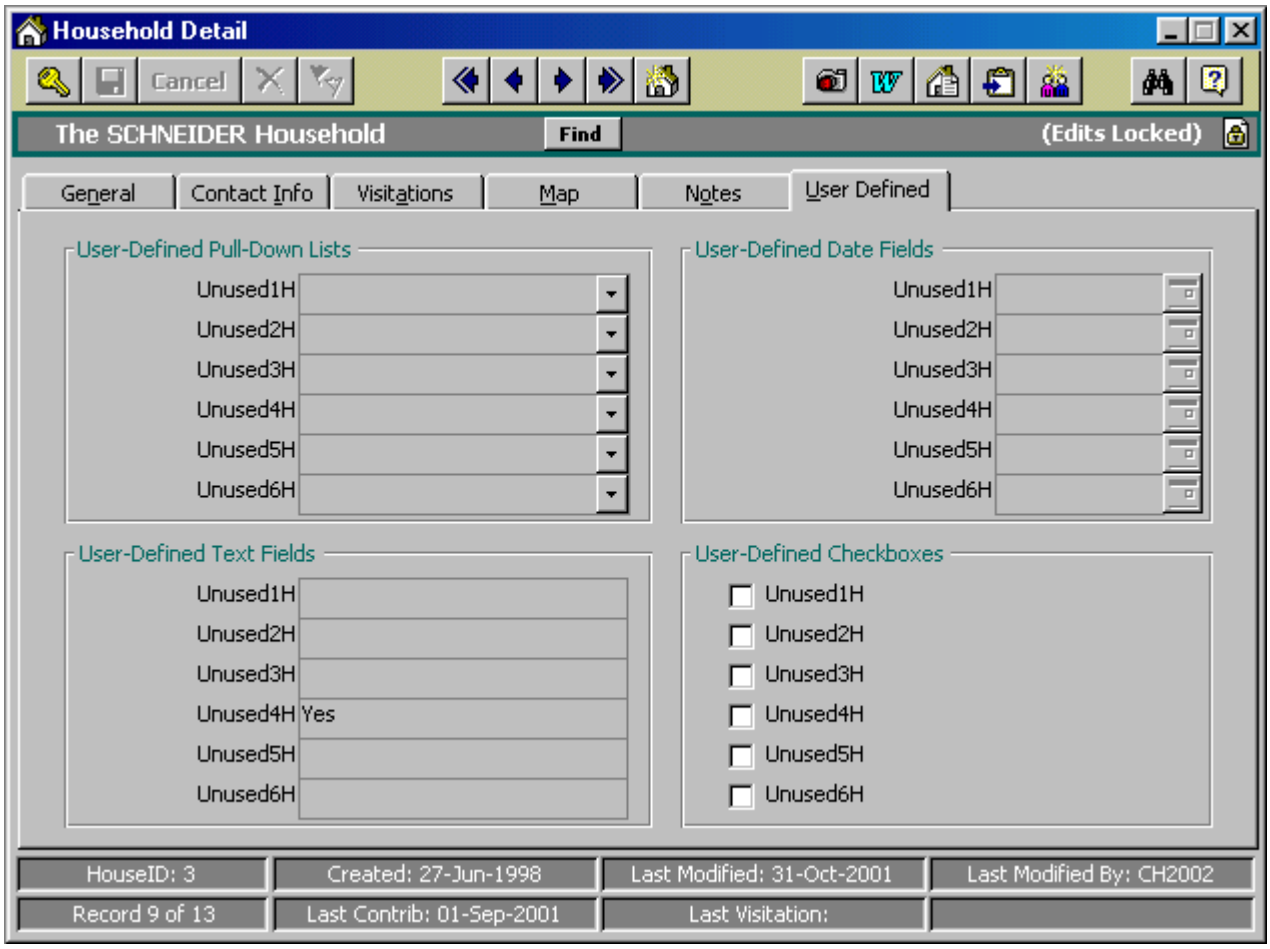
The Notes tab of the Household Detail Form provides extensive storage capability to record detailed notes about the Household. There are 3 separate note fields provided. Each of these note fields has its own security level setting. Also, the note field labels are user-definable. For example, the screen-shot above shows the first note field as "General Notes", however this can be modified (in Households Setup) by the user to whatever might be appropriate for their usage.

The notes data is displayed in the right-hand section of the screen. The user can select which of the 3 note fields to display by selecting the desired note button on the left-hand side of the screen.

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4.3.7 Household Detail Form - "User-Defined" Tab

(Chapter 4 - Households & Individuals)



***"User-Defined Pull-Down Lists"* Section:**
This is where you can assign the Households user-defined pull-down list fields.

***"User-Defined Text Fields"* Section:**
This is where you can assign the Households user-defined text fields.

***"User-Defined Date Fields"* Section:**
This is where you can assign the Households user-defined date fields.

***"User-Defined Checkboxes"* Section:**
This is where you can assign the Households user-defined checkbox fields.

TIP: None of the fields on this tab are required fields.

TIP: By "User-Defined", we mean that the user can define the label of the data field. This label is then utilized throughout the program on the various screens and reports displaying these fields. The labels can be defined in Households Setup .

TIP: Your church may or may not have use for these user-defined Household fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

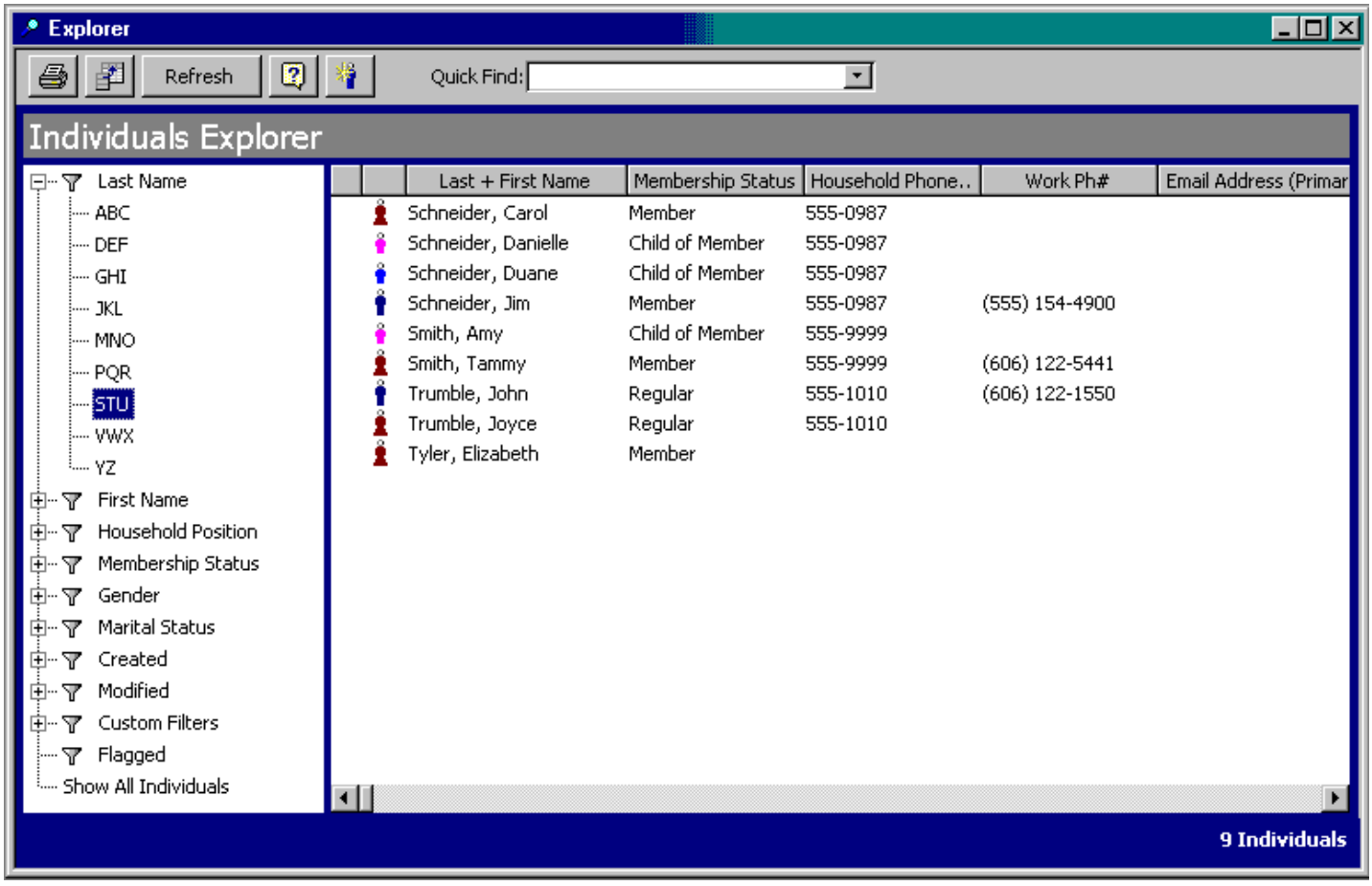
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4.4 Individuals Explorer

(Chapter 4 - Households & Individuals)

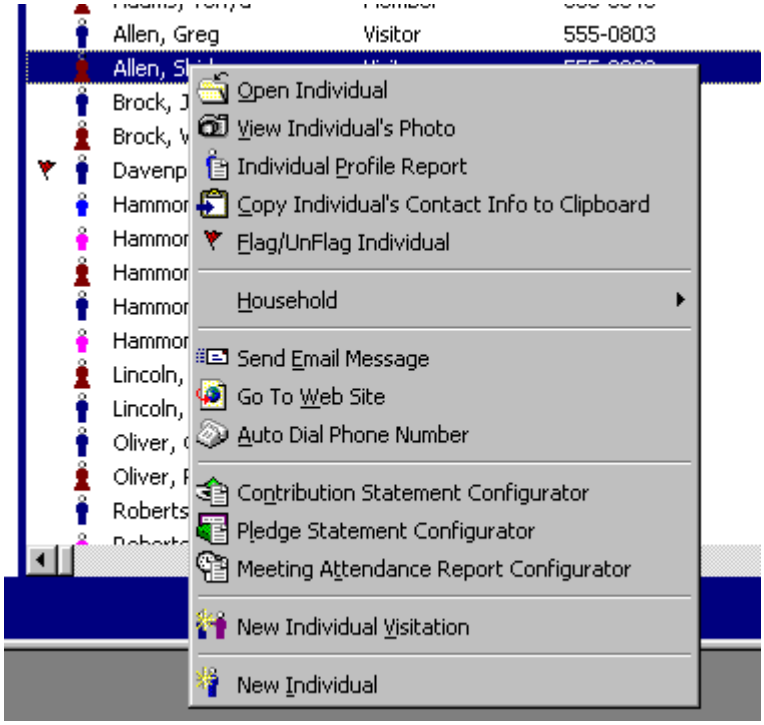
To reach the Individuals Explorer, select "Explorer Views | Individuals Explorer" from the program's main menubar or from the Navigation Menu.

The Individuals Explorer provides you a powerful visual representation of the Individual records contained within your database. The Individuals Explorer view is made up of 2 parts: the TreeView filter component on the left and the ListView data component on the right as shown below:



You can use the TreeView filter to filter exactly which Individual records are displayed in the ListView Data display. The image above shows how the display can be filtered to include only Individuals whose last name begins with S, T, or U. Right-clicking a Individual's record from the ListView Data control will display a useful menu as shown below:

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TIP: Double-clicking an Individual item will open the Individual's record in the Individual Detail Form (which is equivalent to the menu item "Open Individual" from the right-click pop-up menu).

TIP: As with all of the CH2002 Explorer Views, the Individuals Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Individual Detail Form .

TIP: The "Quick Find" pull-down control in the toolbar section of the Explorer provides a method of locating an Individual in the Individual Explorer's ListView control. Select the desired Individual from the Quick Find pull-down either by using the mouse or by simply beginning to enter in the Individual's last name into the pull-down control and then pressing the <ENTER> key on your keyboard. To quickly place the cursor in the Quick Find control, simply press the "F" key (for "Find") from anywhere in the Individuals Explorer.

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4.5 Individual Detail Form

4.5.1 Individual Detail Form

(Chapter 4 - Households & Individuals)

To reach the Individual Detail Form:

- Select "Detail Views | Individual Detail Form" from the program's main menubar or from the Navigation Menu.

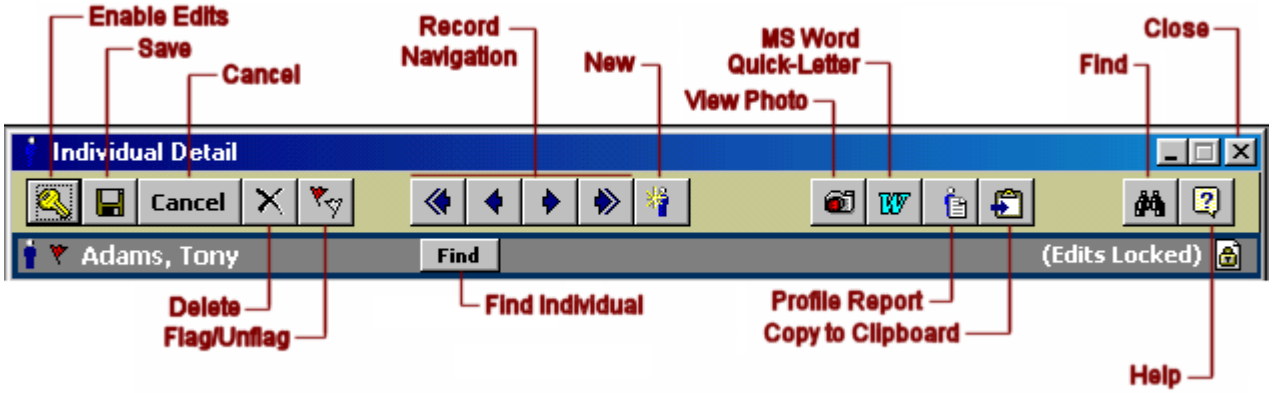
OR

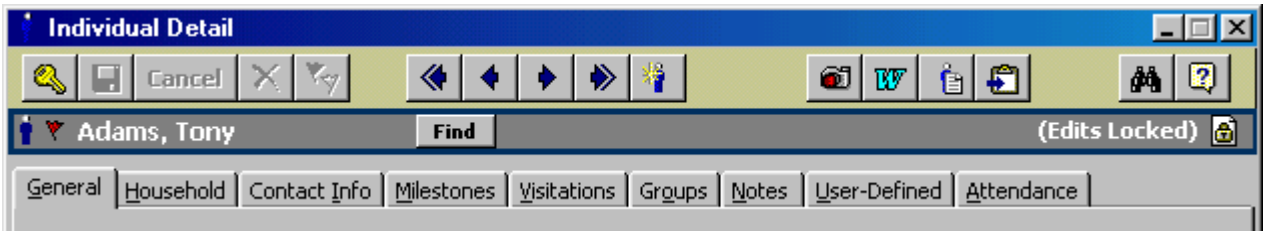
- From the Individuals Explorer, either double-click on an individual from the right-hand side ListView control or choose "Open Individual" from the Individuals Explorer's right-click pop-up menu.

The Individual Detail Form is used to manage Individual records. This form will enable you to:

- Add new Individual records
- Edit/Update Individual records
- View Individual details
- Delete Individual records

The Individual Detail Form's toolbar is shown below:





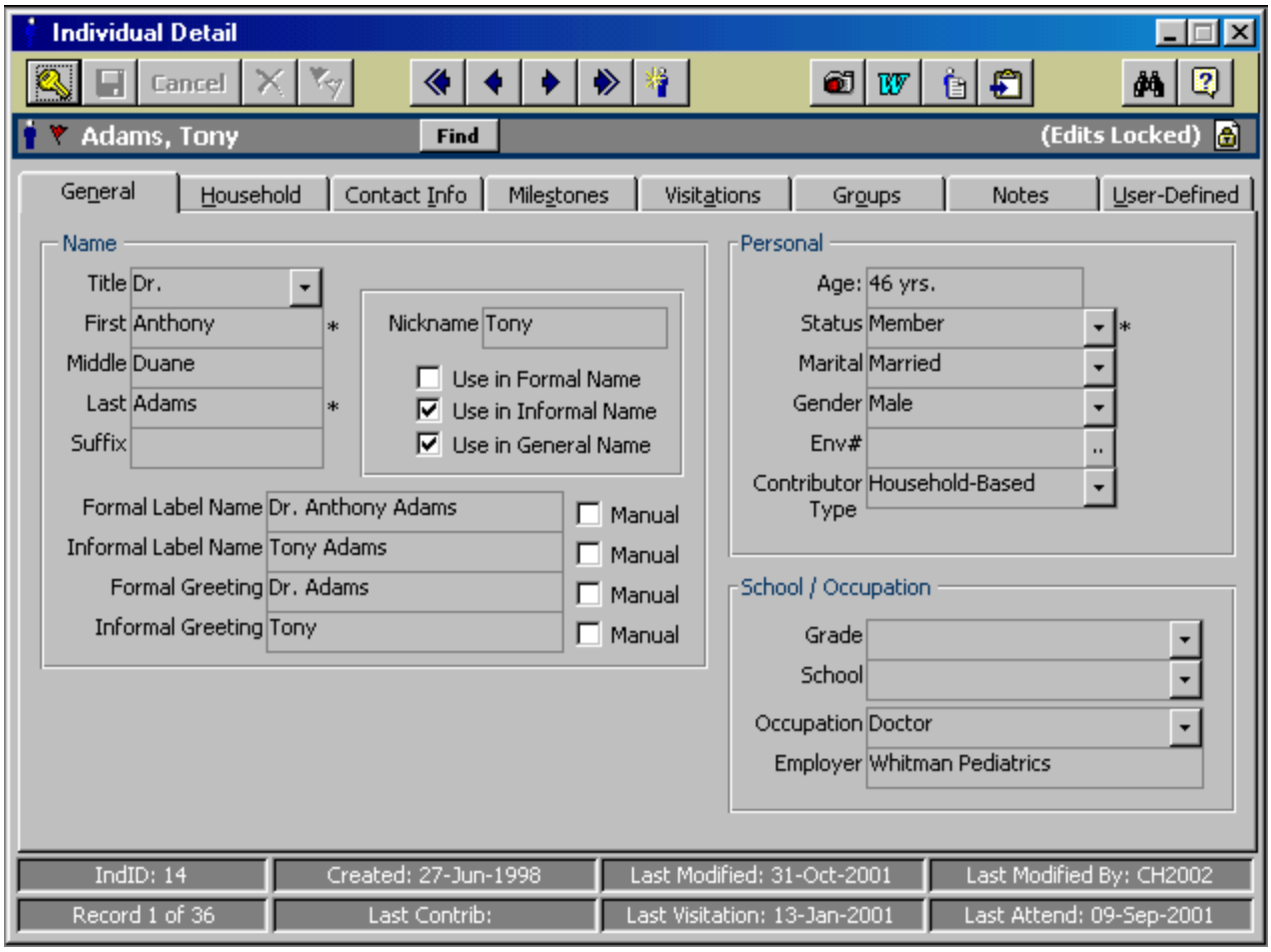
As shown above, the Individual Detail Form is divided into the following "tabs" (sections):

"General" Tab, "Household" Tab, "Contact Info" Tab, "Milestones" Tab, "Visitations" Tab, "Groups" Tab, "Notes" Tab, "User-Defined" Tab, "Attendance" Tab

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4.5.2 Individual Detail Form - "General" Tab

(Chapter 4 - Households & Individuals)



***"Name"* Section:**

This is where you record basic name information of the Individual. When storing a "Nickname" (or "Goes-By" name), you can indicate where the program will utilize the Nickname over the individual's First Name field. The Label Name and Greeting fields can either be generated automatically or the user can check the appropriate "Manual" checkbox (to over-ride the automatic generation) and specify the exact wording of each these fields.

***"Personal"* Section:**

This is where you can record additional information on the Individual including an church membership status, marital status, gender, Envelope#, and Contributor Type.

***"School / Occupation"* Section:**

This is where you can record details about the individual's schooling and/or occupation. You can use the Individuals Setup screen to configure the names values listed in the Grade, School, and Occupation pull-down controls.

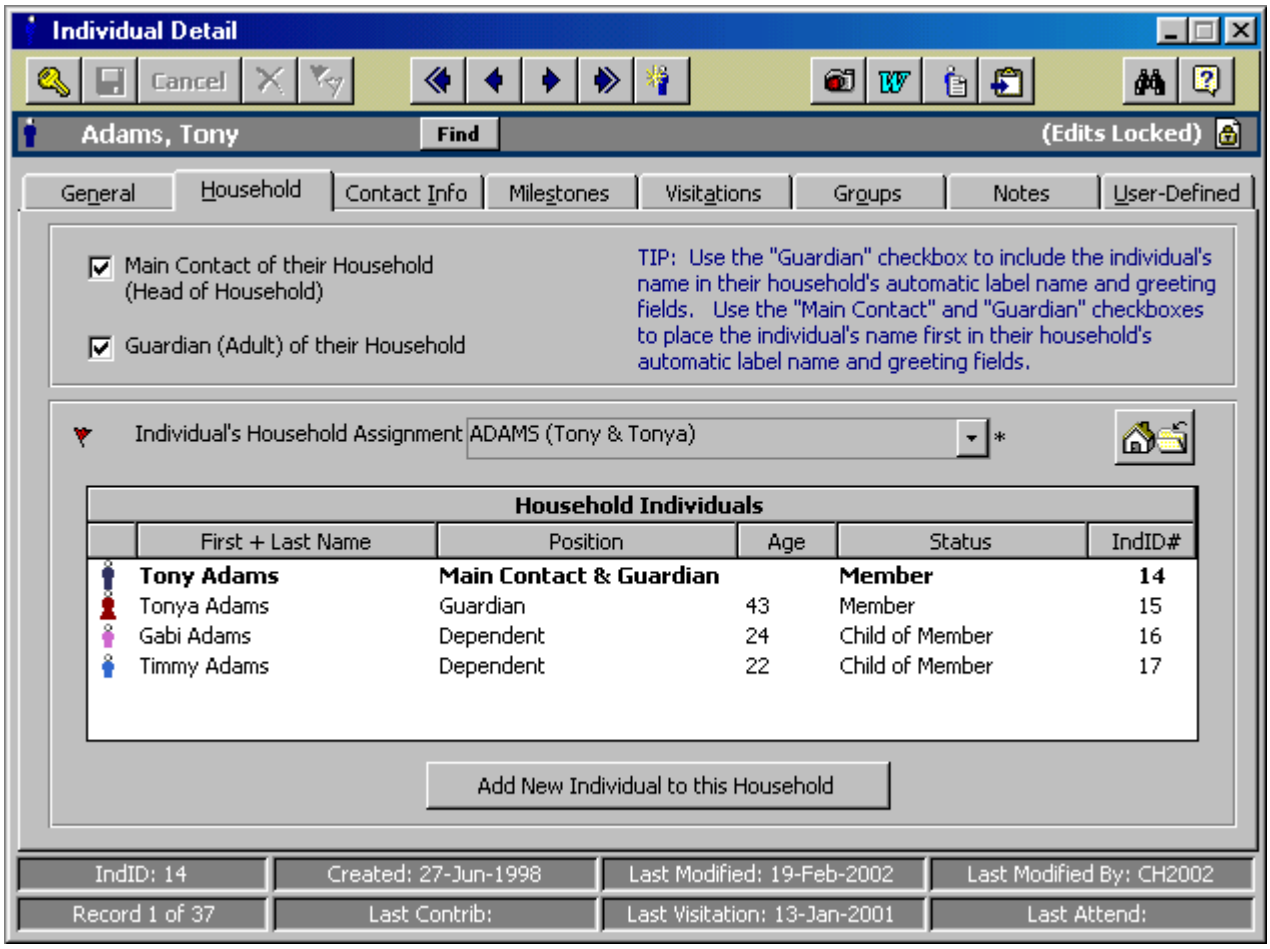
TIP: Only fields marked with an asterisk ("*") are required fields.

TIP: When entering the Individual's First, Middle, and Last names, you don't need to worry about capitalizing the first character - this will automatically be taken care of for you. For example, when entering in an individual named "Tony", just type in "tony" for the first name without worrying about capitalizing the "t". CH2002 will automatically convert your entry to "Tony" once you move to another field on the form or save the record.

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4.5.3 Individual Detail Form - "Household" Tab

(Chapter 4 - Households & Individuals)



This tab is used to display and configure the Individual's household information. The top section contains 2 important checkboxes - Main Contact and Guardian. Check the Main Contact checkbox if the Individual is to be considered the church's main contact from the Household. If the Individual is a Guardian (or adult) of the Household, check the Guardian checkbox.

The "Individual's Household Assignment" pull-down list is where an Individual is "assigned" to a Household. This pull-down list includes all Household records in the database. Every Individual record must be assigned to a Household record before being able to be saved in the database. If you are entering a new Individual record into the database and you have not yet created their Household record, you can select "(New Household)" from this pull-down list to have a new Household record created for the Individual.

The ListView control at the bottom of the form displays the Individuals which have been assigned to the Household. You can double-click on an Individual's name to open the Individual's detail information - or right-click a name for additional options.

If you've got access to the Internet, you can use the "Yahoo! Maps" button to activate our built-in interface with Yahoo's Internet web site to provide "online" mapping of the current Individual's Household address.

TIP: Only fields marked with an asterisk ("*") are required fields.

TIP: The Household-based Label Name and Greeting fields are automatically generated from the names of the Household's Guardian individuals. Therefore, it is important to use the Guardian checkbox to indicate adults of the household (even if there are no dependents/children in the household). Also, the Main Contact checkbox is used to

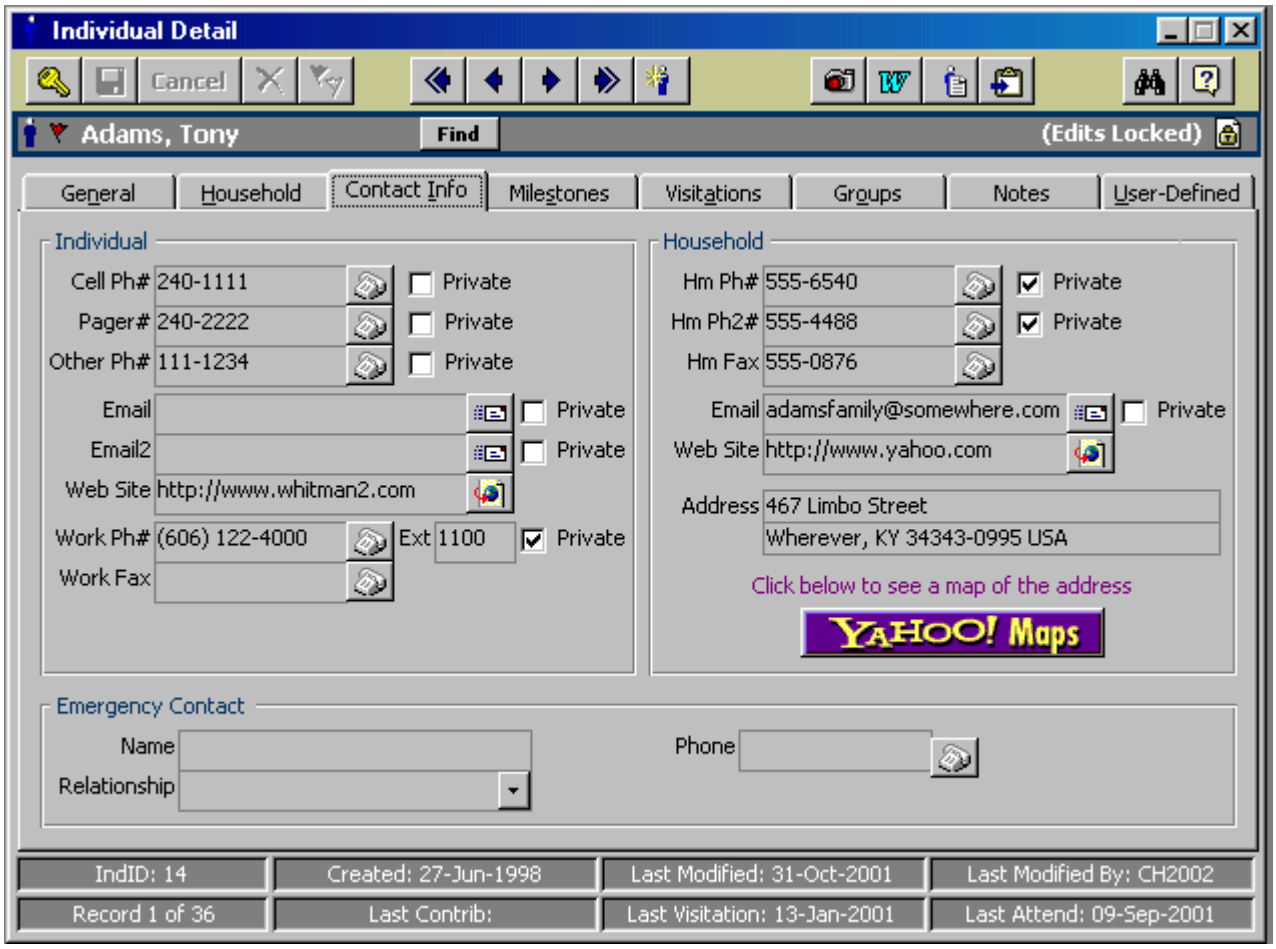
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order the names of the Guardian individuals in the automatically generated household-based Label Name and Greeting fields. The Main Contact individuals are always presented first in these Label Name and Greeting fields.

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4.5.4 Individual Detail Form - "Contact Info" Tab

(Chapter 4 - Households & Individuals)



***"Individual"* Section:**
This is where you can record contact information related to the Individual. This information can include Cell Phone#, Pager#, other Phone#, Email address, secondary Email address, Web site address, work phone#, and work fax#. You can also indicate whether or not any phone# or Email address is to be considered Private.

***"Household"* Section:**
In this section the Individual's Household contact information is displayed. This information is "Read-only" and is modified through the Household Detail Form.

***"Emergency Contact"* Section:**
This is where you can record the emergency contact information for the Individual.

TIP: None of the fields on this tab are required fields.

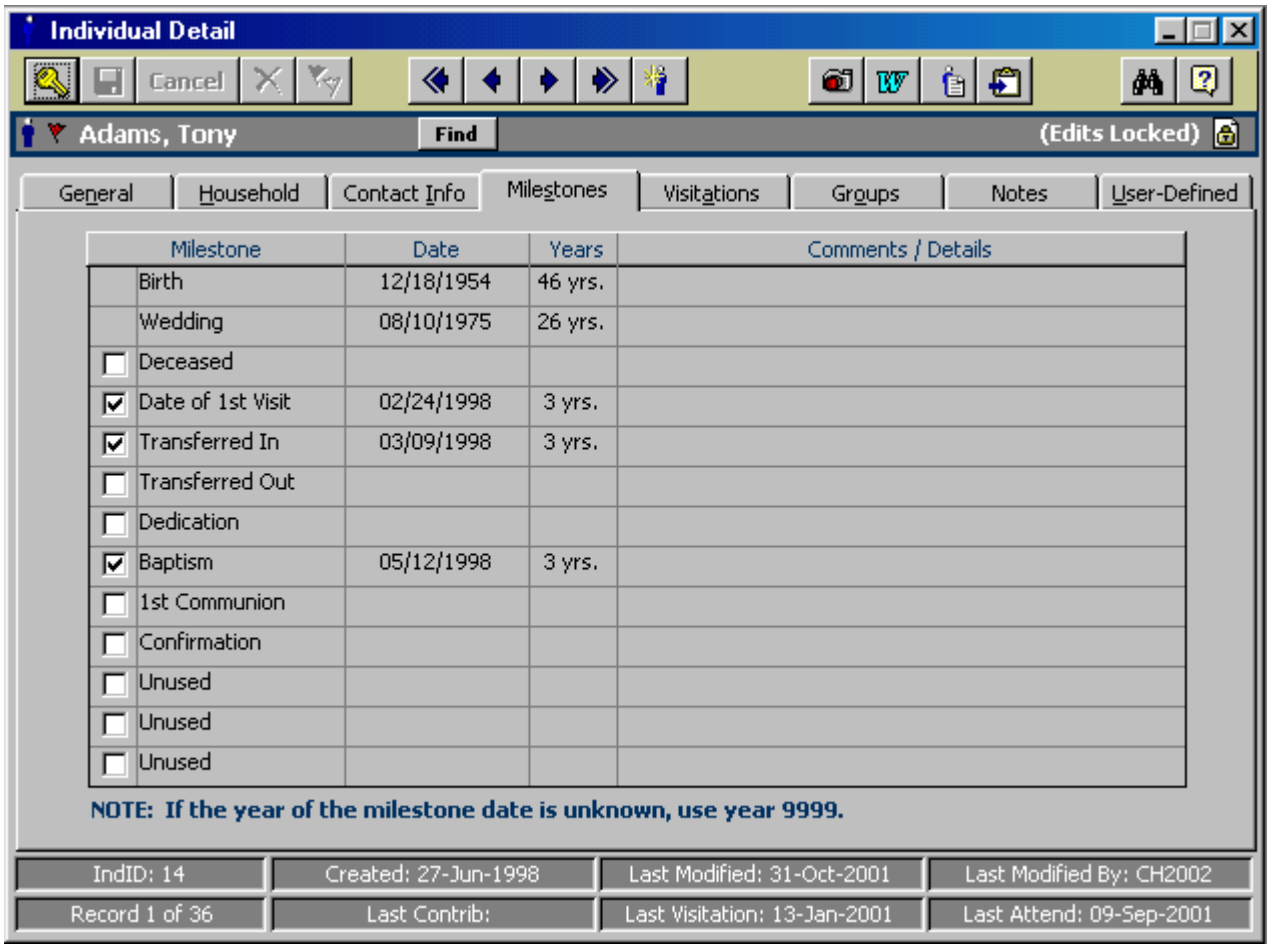
TIP: If your computer is equipped with a modem connected to an active phone line, you can use the dial buttons next to the phone numbers to auto-dial the phone number.

TIP: If your computer is "Internet-enabled", you can use the Email button to the right of the Email fields to automatically open your Email software application with the recorded email address already placed in the "To:" field. In the same way, you can use the button to the right of the Web Site fields to automatically activate your computer's Web browser with the recorded URL (web address) loaded.

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4.5.5 Individual Detail Form - "Milestones" Tab

(Chapter 4 - Households & Individuals)



This tab allows you to record detailed information about important events or milestones in the Individual's life. For each milestone, you can record a date and a comment. The comment can be text which may be useful to you. For example, you could record the birthplace in the comment field of the Birth milestone. Several of the milestones also have a checkbox field to indicate whether or not the milestone has occurred or not. For example, if you know that an individual was Baptized but you don't know the exact date, place a checkmark in the Baptism milestone checkbox and leave the Date field blank.

When a date is entered for any milestone, the "Year" column is calculated to display the number of years since the milestone occurred.

All milestones except for Birth, Wedding, and Deceased are user-definable - meaning that the user can specify the label for the milestone. The user-defined labels for these milestones will then be utilized in the various screens and reports where the milestone information is displayed. You can specify these user-defined milestones through the Individuals Setup screen.

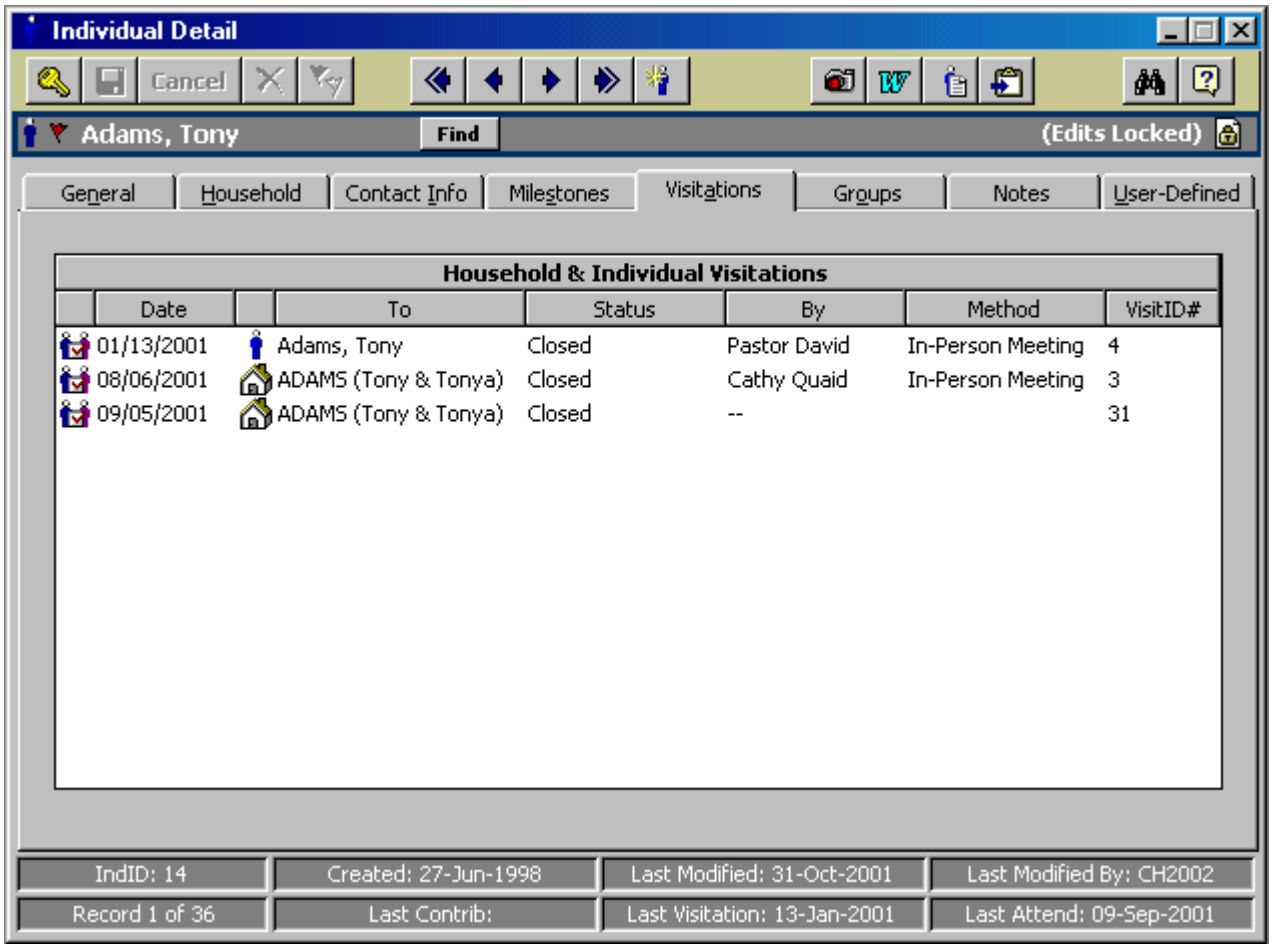
TIP: None of the fields on this tab are required fields.

TIP: On occasion you may know the day and month of a milestone date but not the year. For example, you may know someone's birthdate, but not know the year that they were born. In this case, you can enter the date by using "9999" as the year (since all date fields require a day, month, and year value). For example, "12/31/9999". CH2002 will recognize this as a date where the year is not known.

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4.5.6 Individual Detail Form - "Visitations" Tab

(Chapter 4 - Households & Individuals)



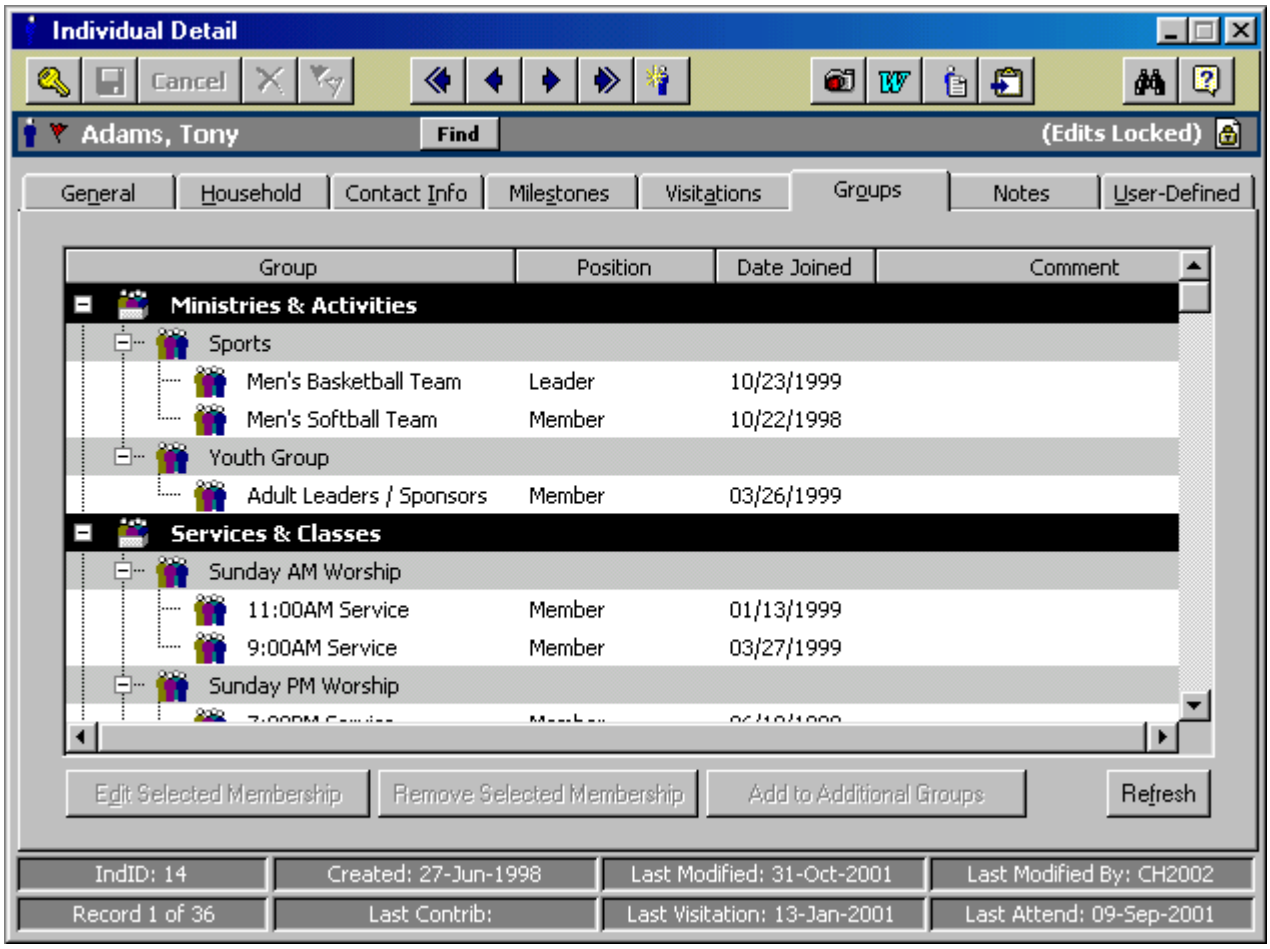
The Visitations Tab contains a ListView control listing all Visitation records associated with the Individual or the Individual's Household. To open the Visitation record, double-click the item from the list. Right-clicking a Visitation item from the list will display a pop-up menu for further options.

TIP: Clicking on the heading of any of the ListView columns will cause the ListView data to be sorted by the this column. Subsequent clicking of the same column heading will toggle between ascending and descending sorts.

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4.5.7 Individual Detail Form - "Groups" Tab

(Chapter 4 - Households & Individuals)



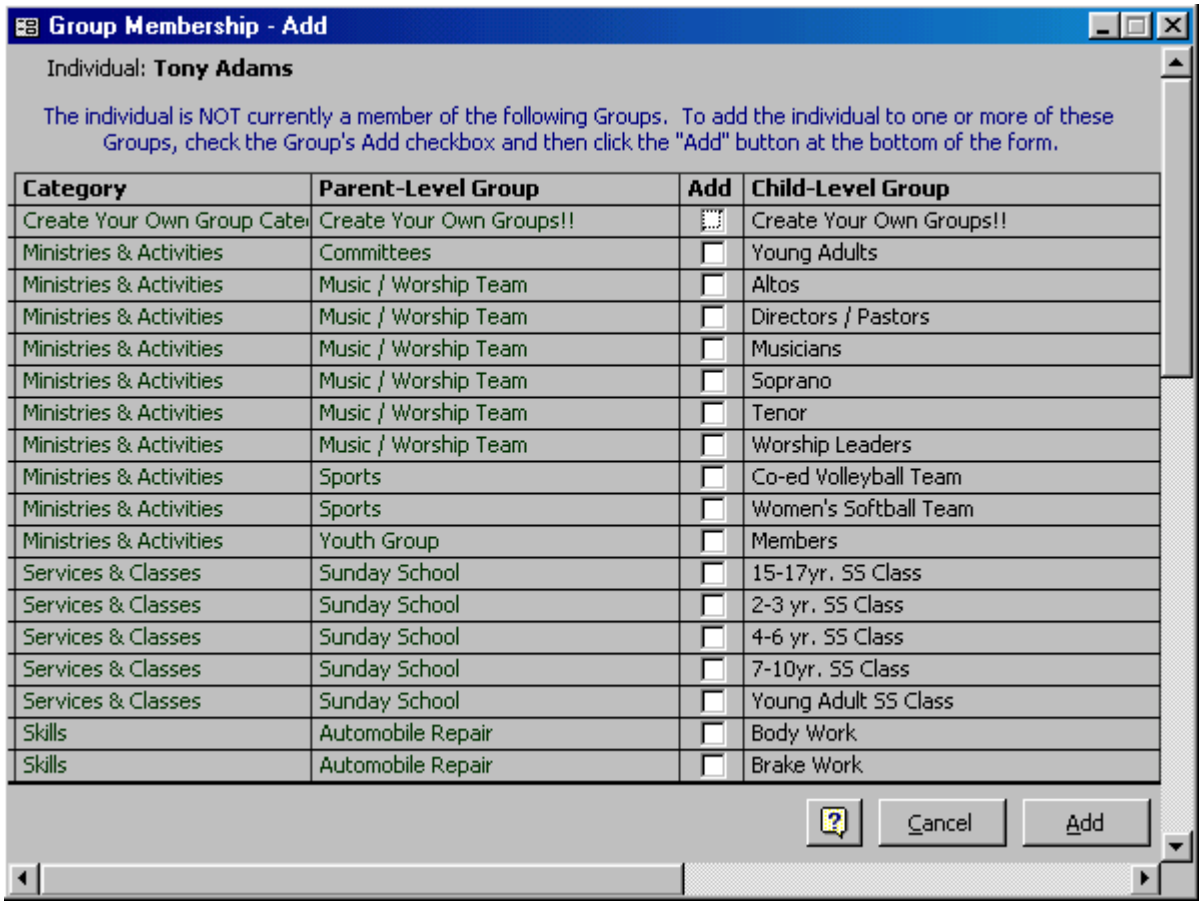
This tab allows you to view the Group Membership assignments for the Individual. A TreeView control is utilized here to display all of the Groups the Individual has membership to. Right-clicking on the name of a Group will show a pop-up menu with editing options as displayed below:



These editing options are also available as buttons at the bottom of the Group tab.

Selecting "Add to Additional Groups" will display the Group Membership - Add form as shown below. Here you can use the Add checkbox to easily add an individual to as many Groups as desired (all in one process).

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Group Membership - Add
Individual: Tony Adams
The individual is NOT currently a member of the following Groups. To add the individual to one or more of these Groups, check the Group's Add checkbox and then click the "Add" button at the bottom of the form.
Cancel
Add

Category	Parent-Level Group	Add	Child-Level Group
Create Your Own Group Cate	Create Your Own Groups!!	☐	Create Your Own Groups!!
Ministries & Activities	Committees	☐	Young Adults
Ministries & Activities	Music / Worship Team	☐	Altos
Ministries & Activities	Music / Worship Team	☐	Directors / Pastors
Ministries & Activities	Music / Worship Team	☐	Musicians
Ministries & Activities	Music / Worship Team	☐	Soprano
Ministries & Activities	Music / Worship Team	☐	Tenor
Ministries & Activities	Music / Worship Team	☐	Worship Leaders
Ministries & Activities	Sports	☐	Co-ed Volleyball Team
Ministries & Activities	Sports	☐	Women's Softball Team
Ministries & Activities	Youth Group	☐	Members
Services & Classes	Sunday School	☐	15-17yr. SS Class
Services & Classes	Sunday School	☐	2-3 yr. SS Class
Services & Classes	Sunday School	☐	4-6 yr. SS Class
Services & Classes	Sunday School	☐	7-10yr. SS Class
Services & Classes	Sunday School	☐	Young Adult SS Class
Skills	Automobile Repair	☐	Body Work
Skills	Automobile Repair	☐	Brake Work

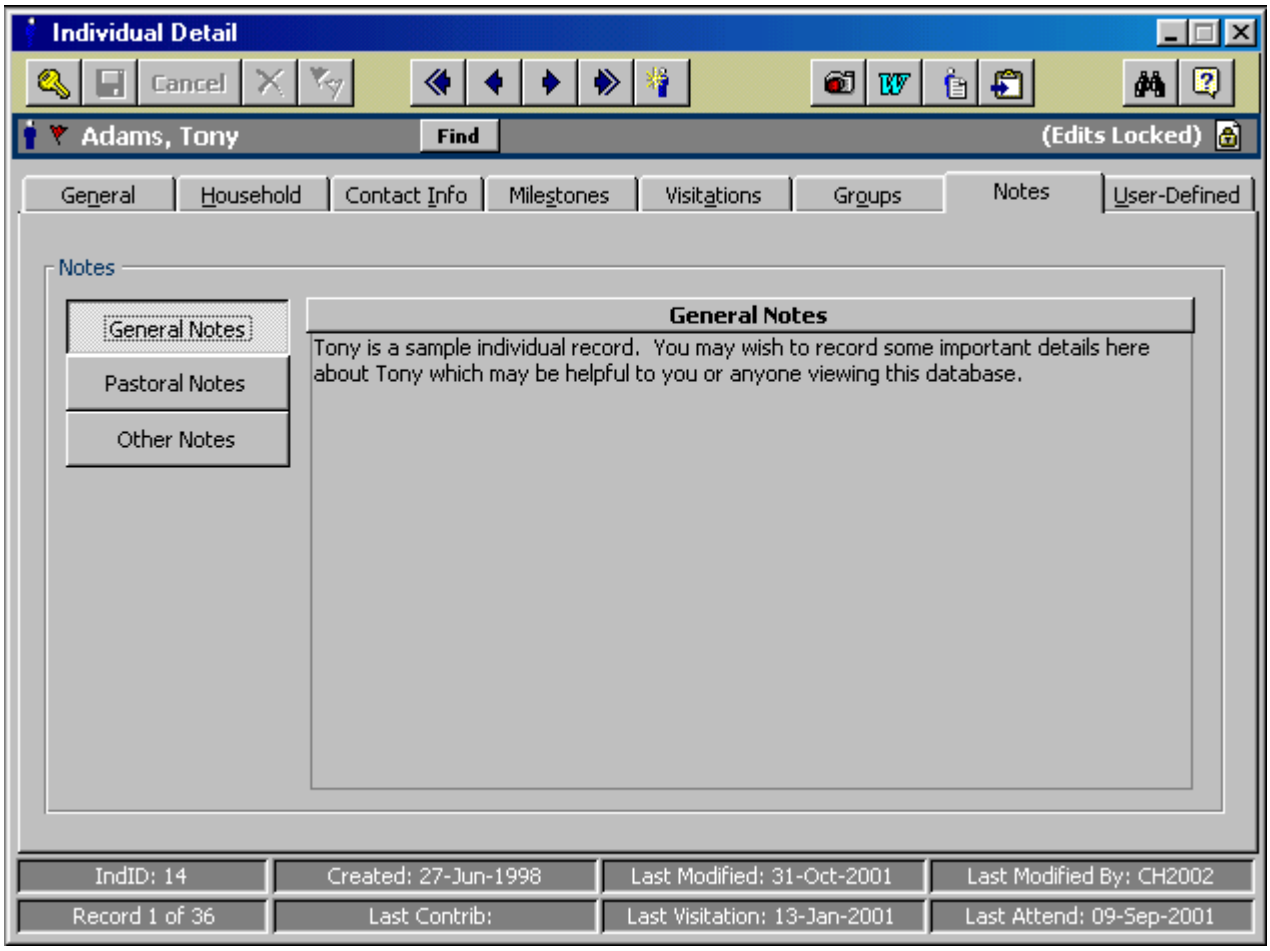
TIP: Group Membership editing is only enabled when the Individual Detail Form is in Edit Mode.

TIP: To edit a single Individual's Group Membership to multiple Groups, the Individual Detail Form - "Groups" Tab (shown above) should be used. However, To add or remove multiple Individuals to/from a single Group, the Group Detail Form - Add Members form should be used instead.

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4.5.8 Individual Detail Form - "Notes" Tab

(Chapter 4 - Households & Individuals)



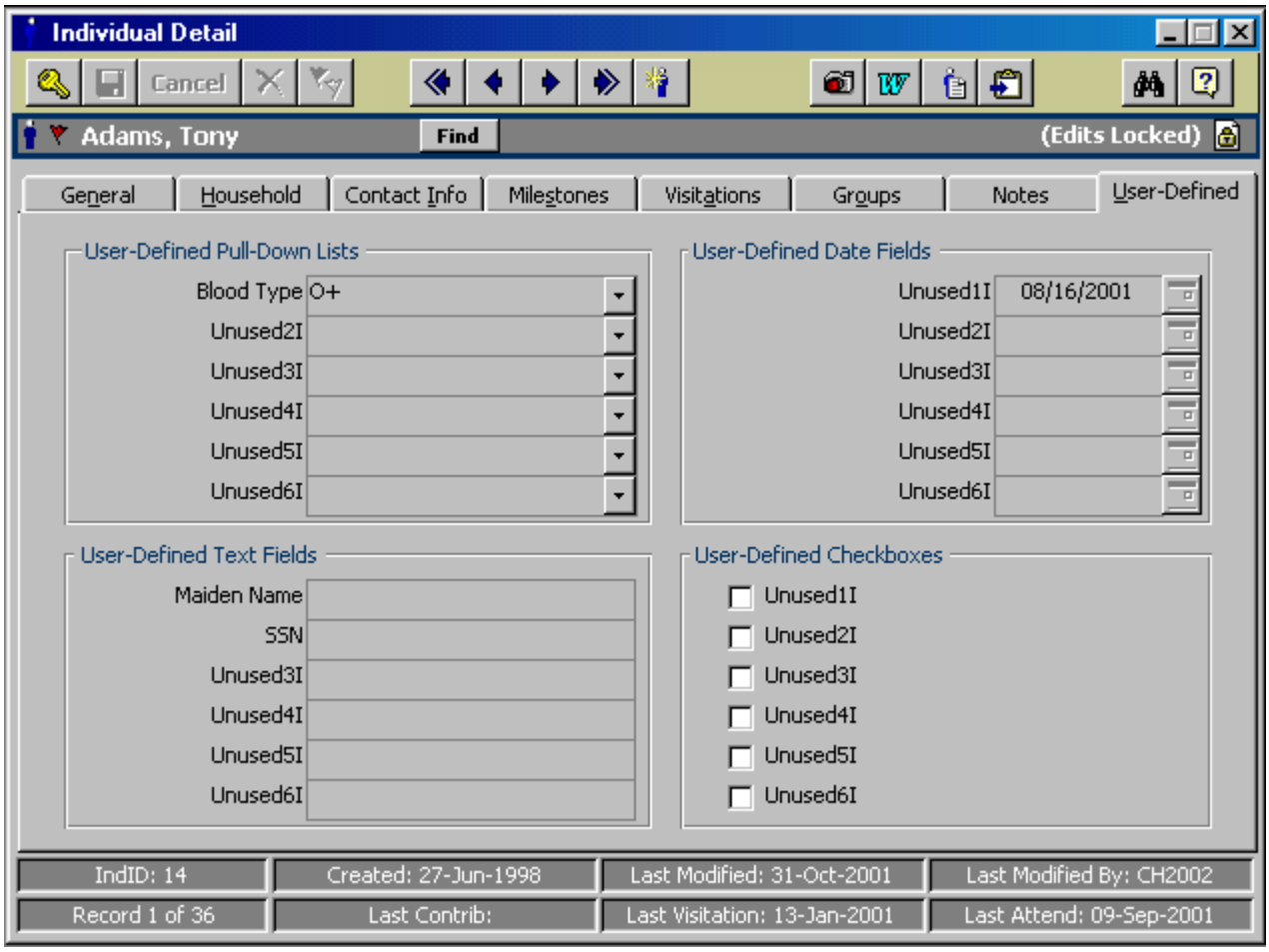
The Notes tab of the Individual Detail Form provides extensive storage capability to record detailed notes about the Individual. There are 3 separate note fields provided. Each of these note fields has its own security level setting. Also, the note field labels are user-definable. For example, the screen-shot above shows the first note field as "General Notes", however this can be modified (in the Individuals Setup) by the user to whatever might be appropriate for their usage.

The notes data is displayed in the right-hand section of the screen. The user can select which of the 3 note fields to display by selecting the desired note button on the left-hand side of the screen.

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4.5.9 Individual Detail Form - "User-Defined" Tab

(Chapter 4 - Households & Individuals)



***"User-Defined Pull-Down Lists"* Section:**
This is where you can assign the Individual's user-defined pull-down list fields.

***"User-Defined Text Fields"* Section:**
This is where you can assign the Individual's user-defined text fields.

***"User-Defined Date Fields"* Section:**
This is where you can assign the Individual's user-defined date fields.

***"User-Defined Checkboxes"* Section:**
This is where you can assign the Individual's user-defined checkbox fields.

TIP: None of the fields on this tab are required fields.

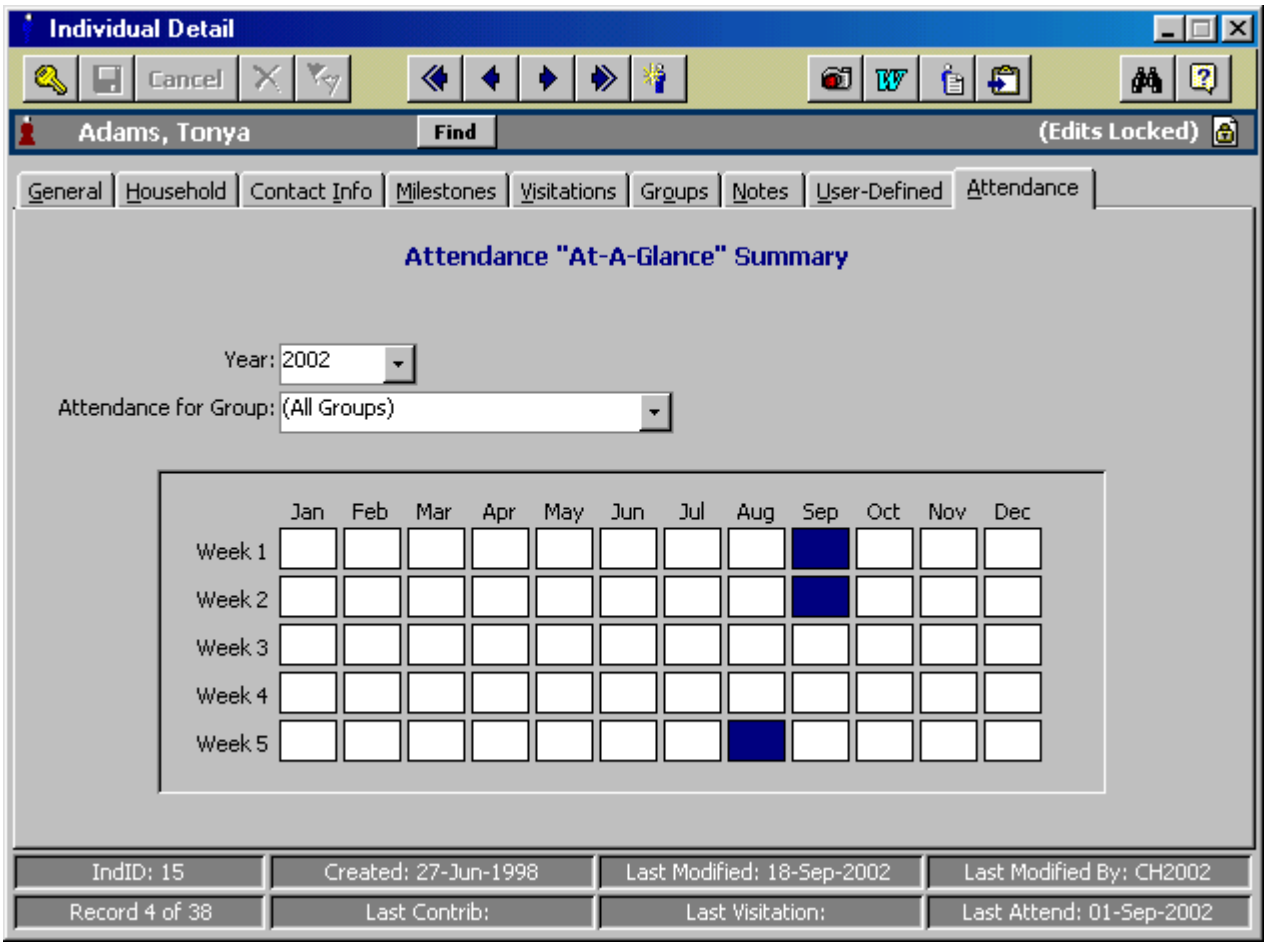
TIP: By "User-Defined", we mean that the user can define the label of the data field. This label is then utilized throughout the program on the various screens and reports displaying these fields. The labels can be defined in Individuals Setup .

TIP: Your church may or may not have use for these user-defined Household fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

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4.5.10 Individual Detail Form - "Attendance" Tab

(Chapter 4 - Households & Individuals)

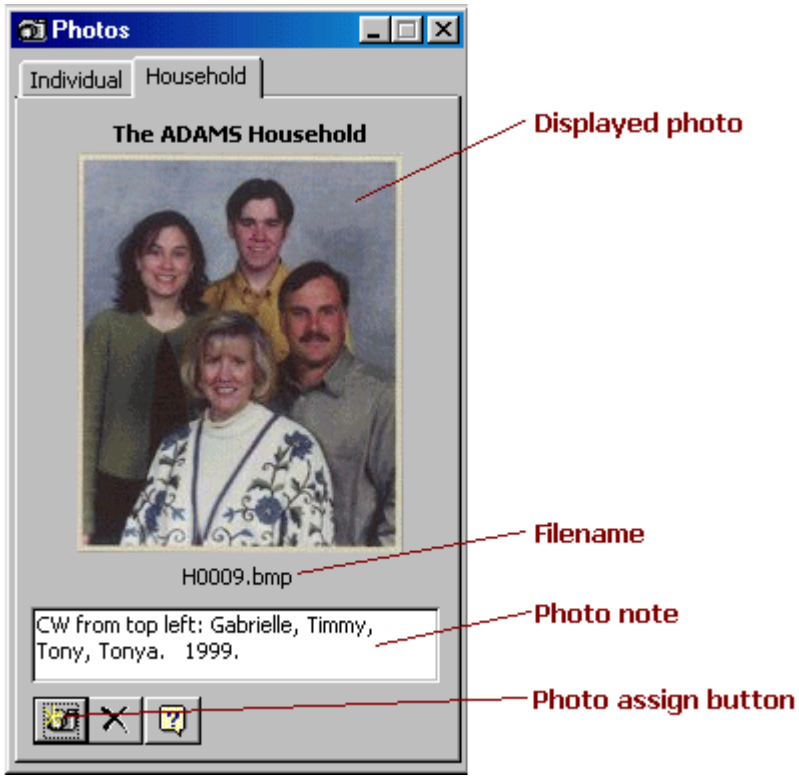


The "Attendance" tab on the Individual Detail Form is useful to get a quick glance at the individual's attendance summary. You can use the "Year" pull-down to specify the which year's attendance data to display. Also, the "Attendance for Group" pull-down can be used to show only attendance history for a particular group's meeting (or meetings for all groups). A blue box indicates that the individual was present for the specified month & week number.

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4.6 Household/Individual Photo Form

(Chapter 4 - Households & Individuals)



The Household/Individual Photo Form enables you to assign/view a photo image associated with Household and Individual records. This form can be opened by clicking on the Photo button located in the toolbar section of the Household Detail Form or Individual Detail Form. The Photo Form can also be opened from the right-click pop-up menu available from the Households Explorer and Individuals Explorer. The Household/Individual Photo Form contains 2 "tabs": 1 for displaying the Household's photo, and 1 for displaying the Individual's photo.

CH2002 records only the filename associated with each Household and/or Individual and does not actually store the image file in the CH2002 database. The image file must be created and saved onto your computer's hard drive by a third-party software program. All photo image files should be located in a single folder on your computer or network file server. You can specify this folder from the General Program Preferences screen ("Setup & Preferences | General Program Preferences). To choose a photo file to be applied to the Household or Individual, use the "Photo Assign Button" .

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4.7 Household & Individual Procedures

4.7.1 Household & Individual Procedures

(Chapter 4 - Households & Individuals)

Viewing Household Records
Editing A Household's Record
Searching For A Household's Record
Adding A New Household's Record
Deleting A Household's Record

Viewing Individual Records
Editing An Individual's Record
Searching For An Individual's Record
Adding A New Individual Record
Deleting An Individual's Record

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4.7.2 Viewing Household Records

(Chapter 4 - Households & Individuals)

Using the Households Explorer:

1. Activate the Households Explorer by selecting "Explorer Views | Households Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Households Explorer to display a desired filter set of Household records in the right-hand side ListView control.
3. The ListView control displays Household records with basic information (name, address, phone number, etc.). For more detailed information about a particular Household record, double-click the Household name or right-click it and select "Open Household" from the pop-up menu. Doing so will open the Household record using the Household Detail Form.

Using the Household Detail Form:

1. You can open the Household Detail Form by opening a Household's detail (through the Households Explorer - see above), or by selecting "Detail Views | Household Detail" from the CH2002 Navigation Menu or top main menubar. From within the Household Detail Form you can navigate to other Household records using the record navigation buttons (arrow buttons) at the top of the Household Detail Form or by selecting a Household from the Household Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select a Household name.

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4.7.3 Editing A Household's Record

(Chapter 4 - Households & Individuals)

1. Open the desired Household record in the Household Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Household Detail Form to enable editing of the form.
3. Make the desired changes to the Household's record.
4. When editing is complete, click the "Save" button  to save the changes you've made.

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4.7.4 Searching For A Household's Record

(Chapter 4 - Households & Individuals)

Using the Households Explorer:

1. Activate the Households Explorer by selecting "Explorer Views | Households Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Households Explorer to display a desired filter set of Household records in the right-hand side ListView control.

   For example, let's say you were searching for the "Wilson" Household's record. You could expand the "Last Name" node of the Households Explorer TreeView control and then click the "vwx" node. This will filter the Explorer's ListView control to display only Household record's whose last name begins with either "V", "W", or "X". Using the TreeView control to filter the ListView control's data will make locating records much easier and more manageable as the number of records in your database grows.

3. The ListView control displays Household records with basic information (name, address, phone number, etc.). For more detailed information about a particular Household record, double-click the Household name or right-click it and select "Open Household" from the pop-up menu. Doing so will open the Household record using the Household Detail Form.

Using the Household Detail Form:

1. Open the Household Detail Form by opening a Household record from the Households Explorer (see above) or by selecting "Detail Views | Household Detail" from the CH2002 Navigation Menu or top main menubar.
2. Once you've opened the Household Detail Form, you can navigate to other Household records using the record navigation buttons (arrow buttons) at the top of the Household Detail Form or by selecting a Household from the Household Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select a Household name. Additionally you can filter the Household Detail Form to limit it to displaying on records meeting a specified criteria if you wish. To filter the form on a particular value, right-click the desired field and select one of the filtering options from the pop-up menu.

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4.7.5 Adding A New Household's Record

(Chapter 4 - Households & Individuals)

You can begin the creation of a new Household record in 3 ways:

1. **Households Explorer**: From the Household Explorer's toolbar, select the New Household button  . This will open the Household Detail Form to a new Household record - ready for your data entry. When you are finished entering the Household's data, click the Household Detail Form's Save button  to save the new record.

2. **Household Detail Form**: From the Household Detail Form's toolbar, select the New Household button  . This will place the form at a new (blank) Household record - ready for your data entry. When you are finished entering the Household's data, click the Household Detail Form's Save button  to save the new record.

3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Household". This will open the Household Detail Form to a new Household record - ready for your data entry. When you are finished entering the Household's data, click the Household Detail Form's Save button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

TIP: After saving a new Household record, a dialog box will be displayed asking you whether or not you wish to create new Individual records for the new Household record you've just created. If at this time you would like to enter in the new Individual records, click the Yes button. If not, choose the No button. You can always add new Individual records and assign them to the Household record at a later time if you wish.

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4.7.6 Deleting A Household's Record

(Chapter 4 - Households & Individuals)

1. Open the desired Household record in the Household Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Household Detail Form to enable editing of the form.
3. Delete the Household record by clicking the Delete button  .
4. Select "Yes" at the delete confirmation prompt.

TIP: Only empty Households (i.e. Households that have no Individuals assigned to them) may be deleted from the database. If you need to delete a Household record which currently has Individuals assigned to it, you must either reassign these Individuals to a different Household or you must delete these Individual records first.

TIP: Deleting a Household record will also delete any Contribution, Pledge, and Visitation records associated with the Household. If the CH2002 security system is enabled, a user must have full write privileges to these related records (if they exist) before the household can be deleted.

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4.7.7 Viewing Individual Records

(Chapter 4 - Households & Individuals)

Using the Individuals Explorer:

1. Activate the Individuals Explorer by selecting "Explorer Views | Individuals Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Individuals Explorer to display a desired filter set of Individual records in the right-hand side ListView control.
3. The ListView control displays Individual records with basic information (name, address, phone number, etc.). For more detailed information about a particular Individual record, double-click the Individual's name or right-click it and select "Open Individual" from the pop-up menu. Doing so will open the Individual record using the Individual Detail Form.

Using the Individual Detail Form:

1. You can open the Individual Detail Form by opening an Individual's detail (through the Individuals Explorer - see above), or by selecting "Detail Views | Individual Detail" from the CH2002 Navigation Menu or top main menubar. From within the Individual Detail Form you can navigate to other Individual records using the record navigation buttons (arrow buttons) at the top of the Individual Detail Form or by selecting an Individual from the Individual Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select an Individual's name.

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4.7.8 Editing An Individual's Record

(Chapter 4 - Households & Individuals)

1. Open the desired Individual record in the Individual Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Individual Detail Form to enable editing of the form.
3. Make the desired changes to the Individual's record.
4. When editing is complete, click the "Save" button  to save the changes you've made.

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4.7.9 Searching For An Individual's Record

(Chapter 4 - Households & Individuals)

Using the Individuals Explorer:

1. Activate the Individuals Explorer by selecting "Explorer Views | Individuals Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Individuals Explorer to display a desired filter set of Individual records in the right-hand side ListView control.

   For example, let's say you were searching for the "John Smith" Household's record. You could expand the "Last Name" node of the Individuals Explorer TreeView control and then click the "stu" node. This will filter the Explorer's ListView control to display only Individual record's whose last name begins with either "S", "T", or "U". Using the TreeView control to filter the ListView control's data will make locating records much easier and more manageable as the number of records in your database grows.

3. The ListView control displays Individual records with basic information (name, address, phone number, etc.). For more detailed information about a particular Individual record, double-click the Individual's name or right-click it and select "Open Individual" from the pop-up menu. Doing so will open the Individual record using the Individual Detail Form.

Using the Individual Detail Form:

1. Open the Individual Detail Form by opening an Individual's record from the Individuals Explorer (see above) or by selecting "Detail Views | Individual Detail" from the CH2002 Navigation Menu or top main menubar.
2. Once you've opened the Individual Detail Form, you can navigate to other Individual records using the record navigation buttons (arrow buttons) at the top of the Individual Detail Form or by selecting an Individual from the Individual Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select an Individual's name. Additionally you can filter the Individual Detail Form to limit it to displaying on records meeting a specified criteria if you wish. To filter the form on a particular value, right-click the desired field and select one of the filtering options from the pop-up menu.

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4.7.10 Adding A New Individual Record

(Chapter 4 - Households & Individuals)

You can begin the creation of a new Individual record in 4 ways:

1. **Individuals Explorer**: From the Individuals Explorer's toolbar, select the New Individual button  . This will open the Individual Detail Form to a new Individual record - ready for your data entry. When you are finished entering the Individual's data, click the Individual Detail Form's Save button  to save the new record.
2. **Individual Detail Form**: From the Individual Detail Form's toolbar, select the New Individual button  . This will place the form at a new (blank) Individual record - ready for your data entry. When you are finished entering the Individual's data, click the Individual Detail Form's Save button  to save the new record.
3. **Household Detail Form**: From the Household Detail Form's "General" tab, click the "Add New Individual To This Household" button near the bottom of the form. This will open the Individual Detail Form to a new Individual record - ready for your data entry. When you are finished entering the Individual's data, click the Individual Detail Form's Save button  to save the new record.
4. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Individual". This will open the Individual Detail Form to a new Individual record - ready for your data entry. When you are finished entering the Individual's data, click the Individual Detail Form's Save button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

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4.7.11 Deleting An Individual's Record

(Chapter 4 - Households & Individuals)

1. Open the desired Individual record in the Individual Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Individual Detail Form to enable editing of the form.
3. Delete the Individual record by clicking the Delete button  .
4. Select "Yes" at the delete confirmation prompt.

TIP: Deleting an Individual record will also delete any Group Membership, Contribution, Pledge, and Visitation records associated with the Individual. If the CH2002 security system is enabled, a user must have full write privileges to these related records (if they exist) before the Individual can be deleted.

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Chapter 5

5 Chapter 5 - Contacts

5.1 Chapter 5 - Contacts

Chapter 5 Sections:

- Contacts Explorer
- Contact Detail Form
- Contact Procedures

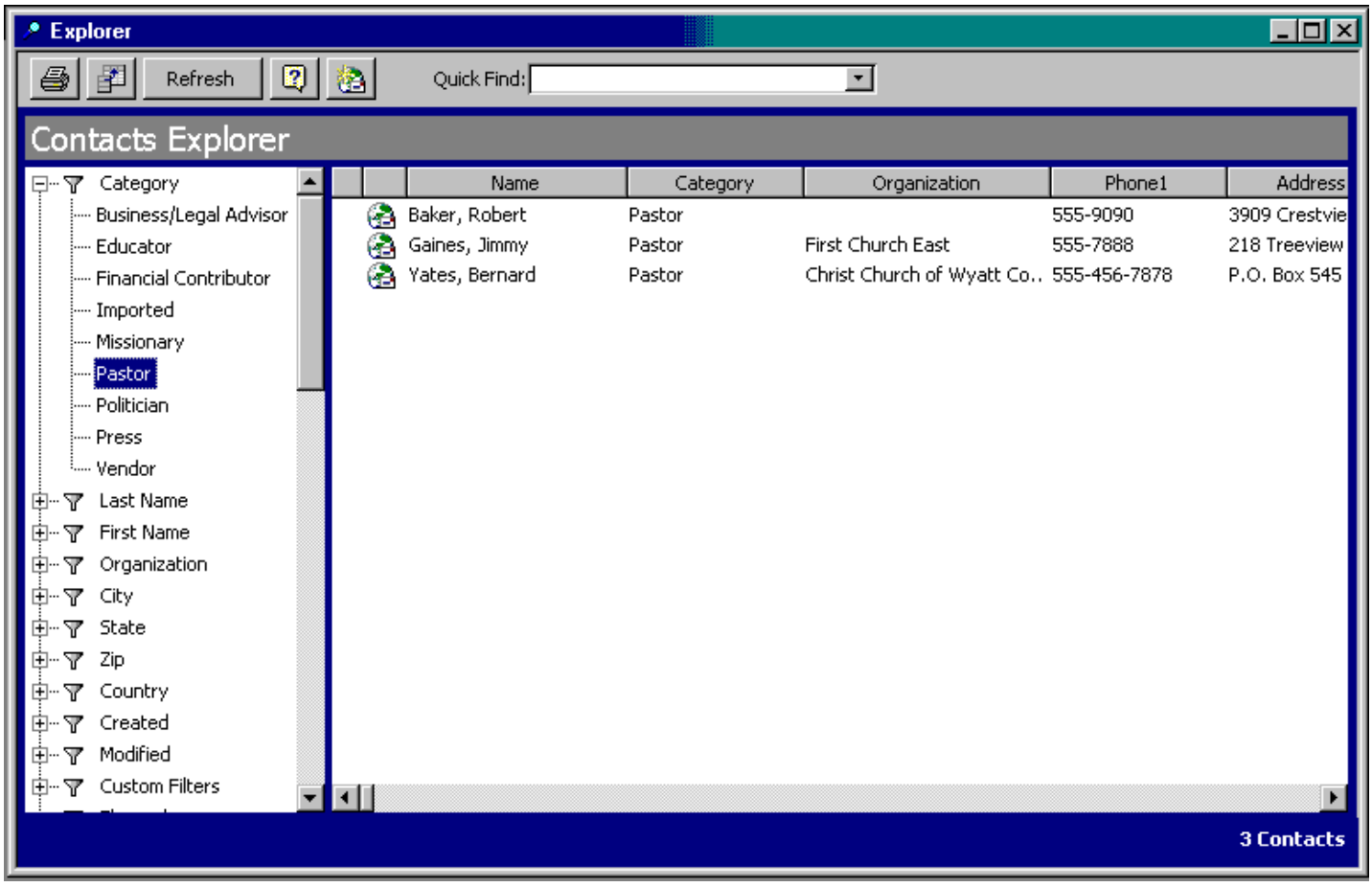
(c) Copyright 2001 Helpmate Technology Solutions

5.2 Contacts Explorer

(Chapter 5 - Contacts)

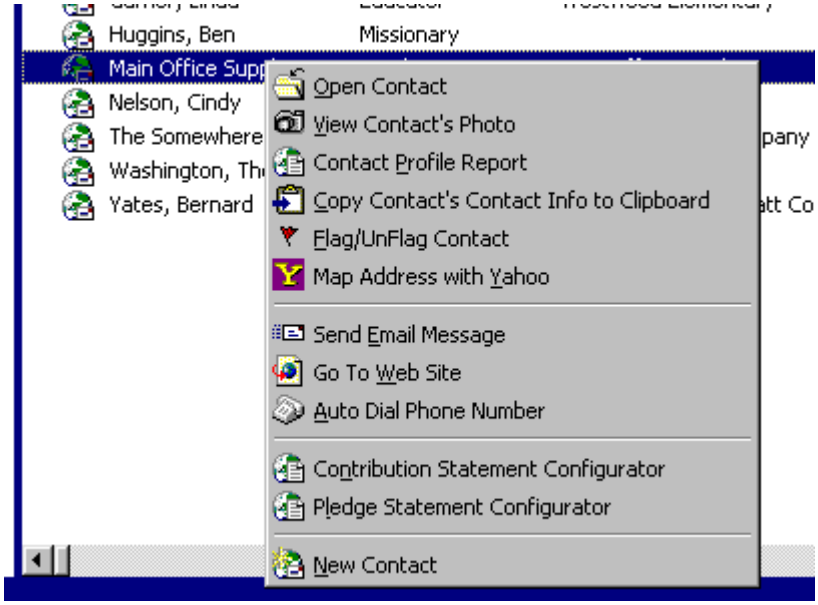
To reach the Contacts Explorer, select "Explorer Views | Contacts Explorer" from the program's main menubar or from the Navigation Menu.

The Contacts Explorer provides you a powerful visual representation of the Contact records contained within your database. The Contacts Explorer view is made up of 2 parts: the TreeView filter component on the left and the ListView data component on the right as shown below:



You can use the TreeView filter to filter exactly which Contact records are displayed in the ListView Data display. The image above shows how the display can be filtered to include only Contact in the Category named "Pastor". Right-clicking a Contact's record from the ListView Data control will display a useful menu as shown below:

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TIP: Double-clicking a Contact item will open the Contact's record in the Contact Detail Form (which is equivalent to the menu item "Open Contact" from the right-click pop-up menu).

TIP: As with all of the CH2002 Explorer Views, the Contacts Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Contact Detail Form .

TIP: The "Quick Find" pull-down control in the toolbar section of the Explorer provides a method of locating a Contact in the Contact Explorer's ListView control. Select the desired Contact from the Quick Find pull-down either by using the mouse or by simply beginning to enter in the Contact's name into the pull-down control and then pressing the <ENTER> key on your keyboard. To quickly place the cursor in the Quick Find control, simply press the "F" key (for "Find") from anywhere in the Contacts Explorer.

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5.3 Contact Detail Form

5.3.1 Contact Detail Form

(Chapter 5 - Contacts)

To reach the Contact Detail Form:

- Select "Detail Views | Contact Detail Form" from the program's main menubar or from the Navigation Menu.

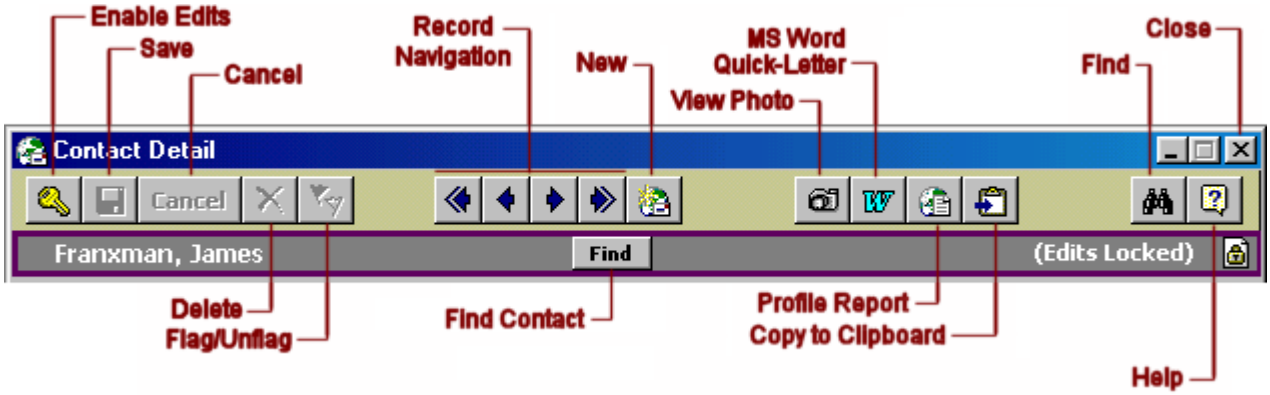
OR

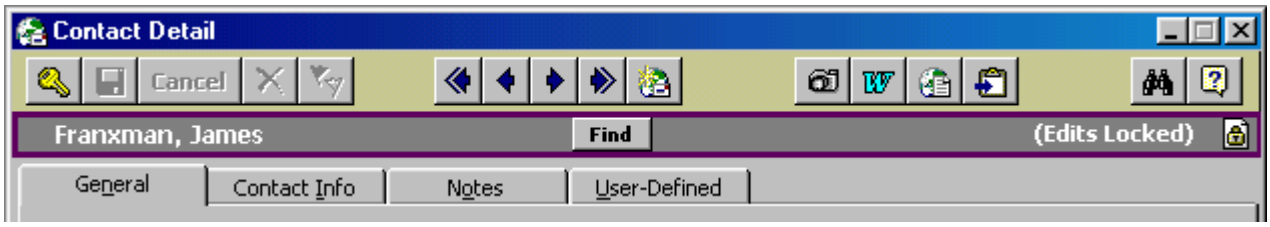
- From the Contacts Explorer, either double-click on an individual from the right-hand side ListView control or choose "Open Contact" from the Contacts Explorer's right-click pop-up menu.

The Contact Detail Form is used to manage Contact records. This form will enable you to:

- Add new Contact records
- Edit/Update Contact records
- View Contact details
- Delete Contact records

The Contact Detail Form's toolbar is shown below:





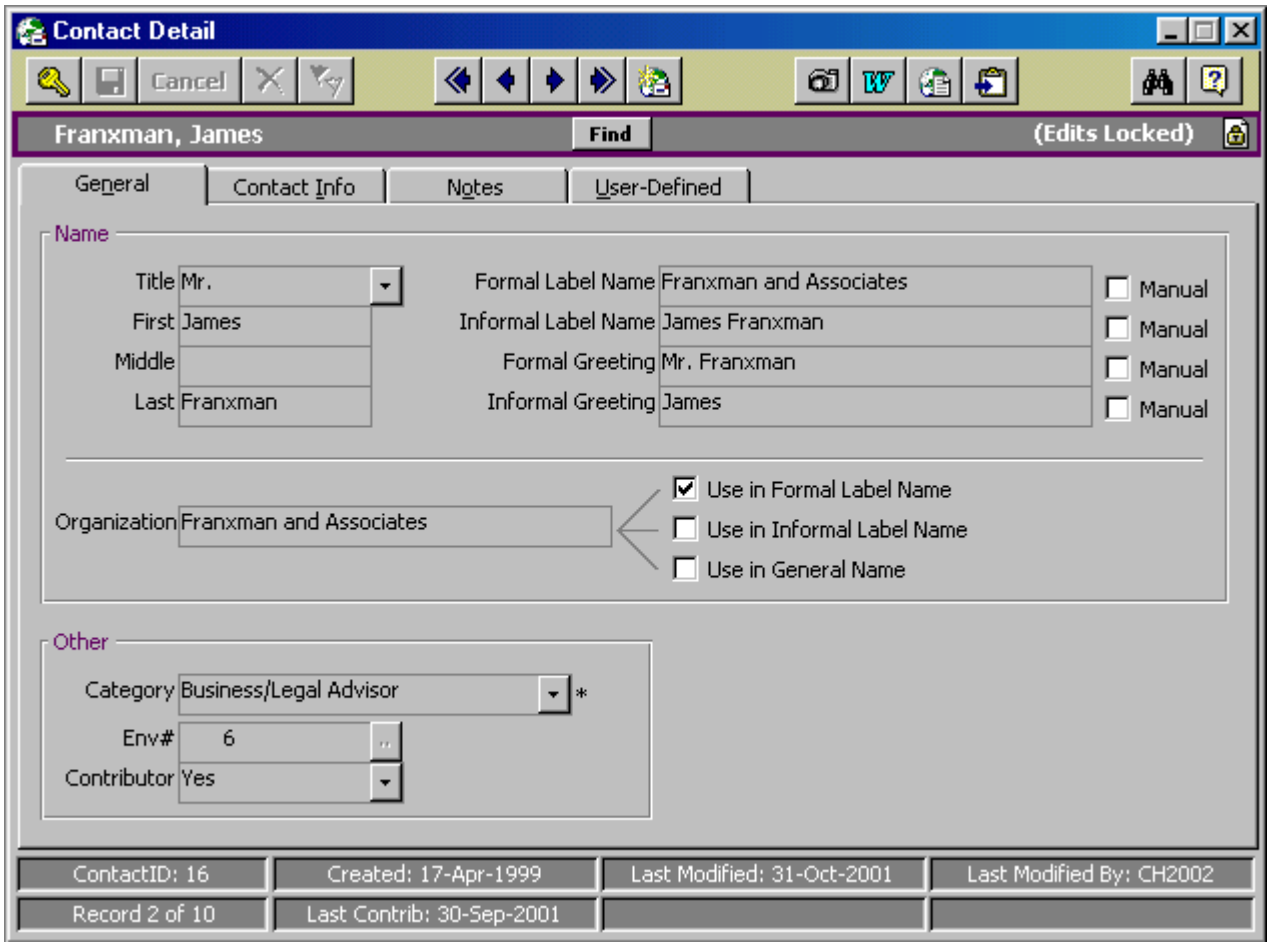
As shown above, the Contact Detail Form is divided into the following "tabs" (sections):

"General" Tab, "Contact Info" Tab, "Notes" Tab, "User-Defined" Tab

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5.3.2 Contact Detail Form - "General" Tab

(Chapter 5 - Contacts)



***"Name"* Section:**

This is where you record basic name information of the Contact. When storing an Organization name, you can indicate where the program will utilize the Organization name over the Contact's First and Last Name fields. The Label Name and Greeting fields can either be generated automatically or the user can check the appropriate "Manual" checkbox and specify the exact wording of each these fields.

***"Other"* Section:**

This is where you record additional information including the Contact's Category, Envelope number, and Contributor Type.

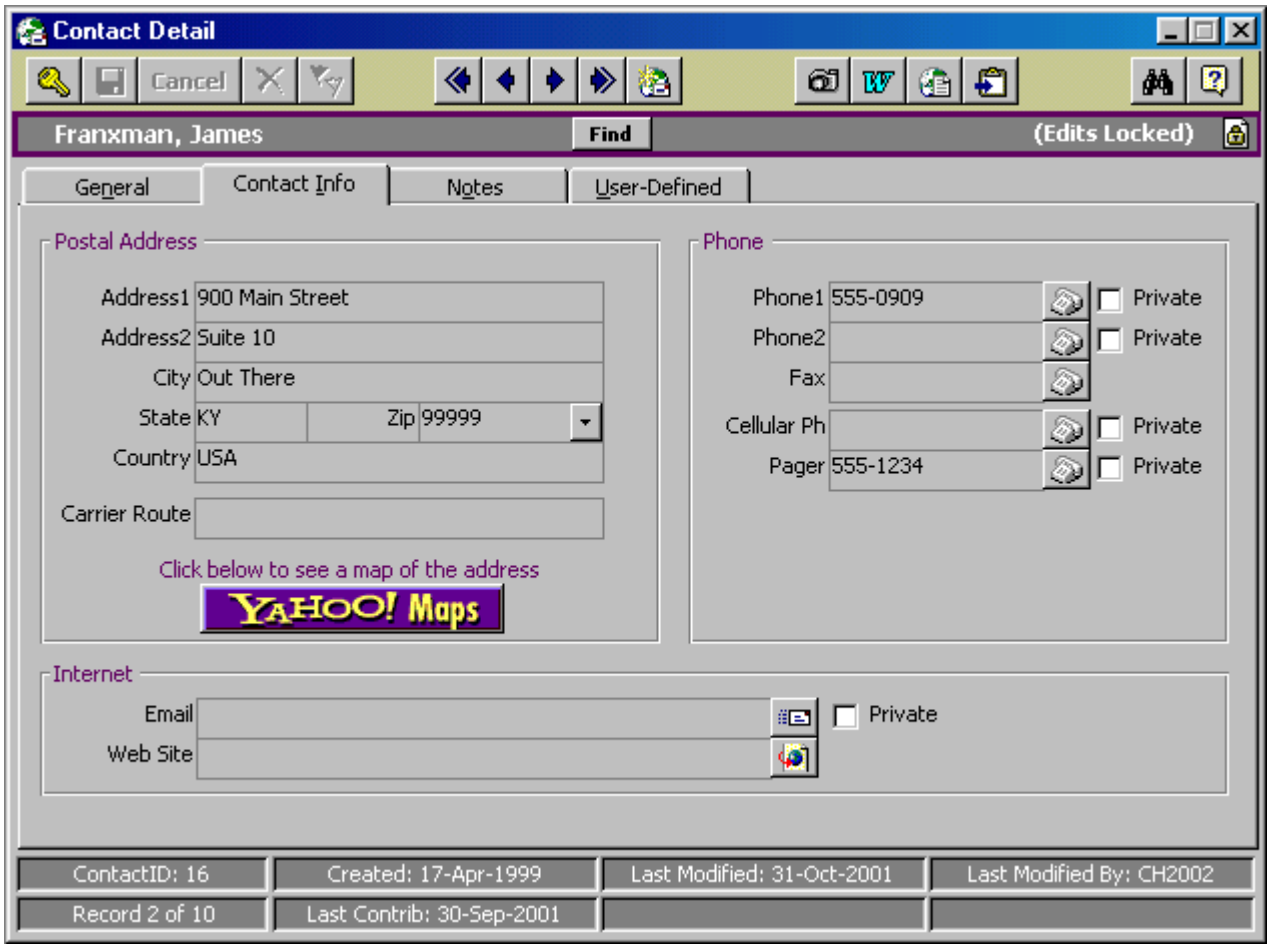
TIP: Only fields marked with an asterisk ("*") are required fields.

TIP: When entering the Contact's First and Last names, you don't need to worry about capitalizing the first character - this will automatically be taken care of for you. For example, when entering in a Contact named "Robert", just type in "robert" for the first name without worrying about capitalizing the "r". CH2002 will automatically convert your entry to "Robert" once you move to another field on the form or save the record.

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5.3.3 Contact Detail Form - "Contact Info" Tab

(Chapter 5 - Contacts)



***"Postal Address"* Section:**
This is where you record the Contact's postal address information.

If you've got access to the Internet, you can use the "Yahoo! Maps" button to activate our built-in interface with Yahoo's Internet web site to provide "online" mapping of the current Contact's address.

***"Phone"* Section:**
This is where you record the Contact's phone information. You can utilize the "Dial" buttons to the left of each phone number field to activate the auto-dial functionality (requires a modem).

***"Internet"* Section:**
This is where you record the Contact's Internet information (email and web site addresses). You can utilize the buttons to the left of these fields to either create a new email message to the individual or connect to their web site (requires Internet access).

TIP: None of the fields on this tab are required fields.

TIP: You can setup the Postal Code Lookup Table to have the City and State address fields be automatically filled in when a Zip/Postal Code value is entered (if the Zip/Postal Code value is in the lookup table).

TIP: If your computer is equipped with a modem connected to an active phone line, you can use the dial buttons next to

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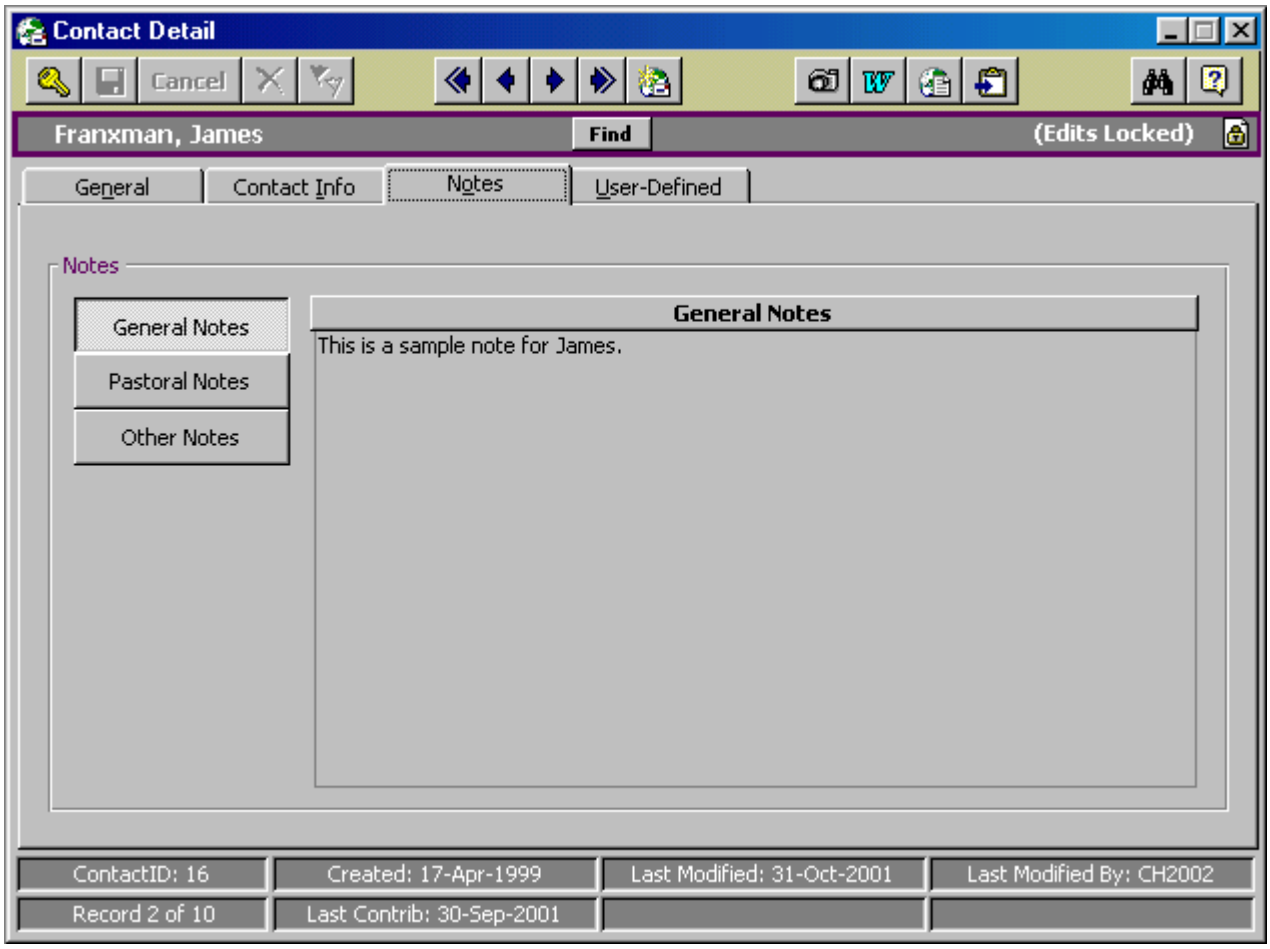
the Contact's phone numbers to auto-dial the phone number.

TIP: If your computer is "Internet-enabled", you can use the Email button to the right of the Email field to automatically open your Email software application with the Contact's email address already placed in the "To:" field. In the same way, you can use the button to the right of the Web Site field to automatically activate your computer's Web browser with the Contact's URL (web address) loaded.

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5.3.4 Contact Detail Form - "Notes" Tab

(Chapter 5 - Contacts)



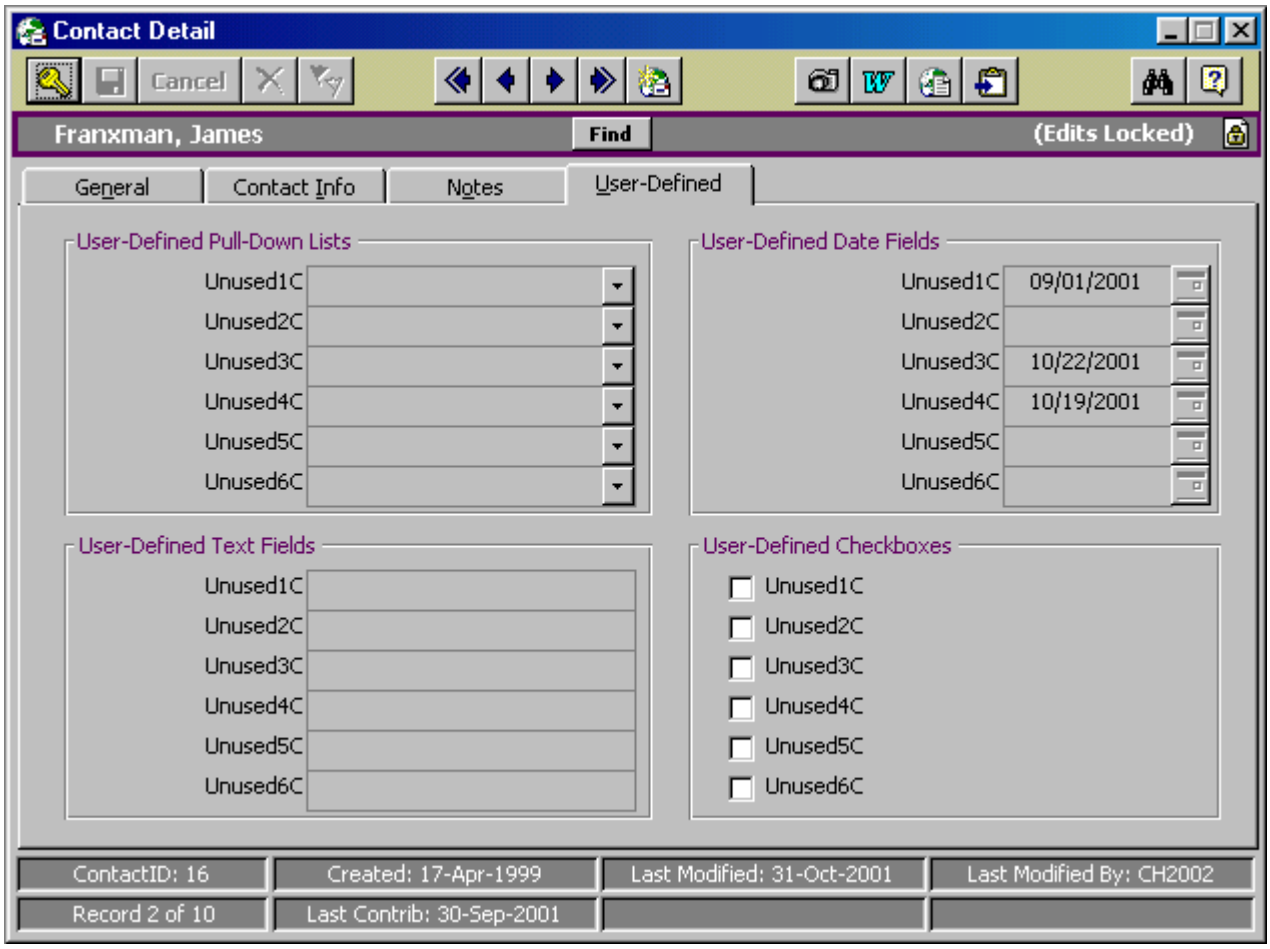
The Notes tab of the Contact Detail Form provides extensive storage capability to record detailed notes about the Contact. There are 3 separate note fields provided. Each of these note fields has its own security level setting. Also, the note field labels are user-definable. For example, the screen-shot above shows the first note field as "General Notes", however this can be modified (in Contacts Setup) by the user to whatever might be appropriate for their usage.

The notes data is displayed in the right-hand section of the screen. The user can select which of the 3 note fields to display by selecting the desired note button on the left-hand side of the screen.

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5.3.5 Contact Detail Form - "User-Defined" Tab

(Chapter 5 - Contacts)



***"User-Defined Pull-Down Lists"* Section:**
This is where you can assign the Contact's user-defined pull-down list fields.

***"User-Defined Text Fields"* Section:**
This is where you can assign the Contact's user-defined text fields.

***"User-Defined Date Fields"* Section:**
This is where you can assign the Contact's user-defined date fields.

***"User-Defined Checkboxes"* Section:**
This is where you can assign the Contact's user-defined checkbox fields.

TIP: None of the fields on this tab are required fields.

TIP: By "User-Defined", we mean that the user can define the label of the data field. This label is then utilized throughout the program on the various screens and reports displaying these fields. The labels can be defined in Contacts Setup .

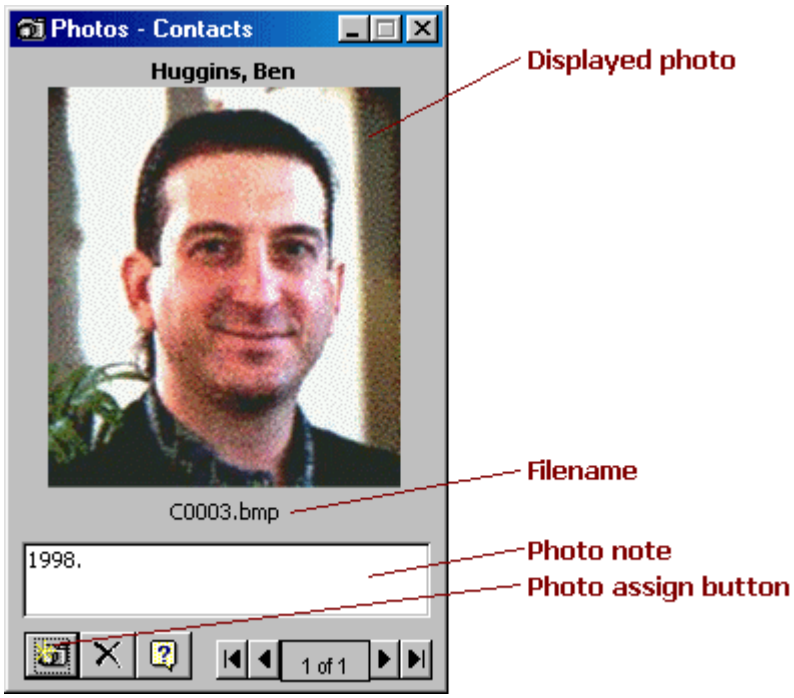
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TIP: Your church may or may not have use for these user-defined Household fields. Discuss the possibilities with those in administrative positions in your church to see what date fields might be useful for your church to record and maintain. Of course, you do not have to utilize any of the user-defined fields if they are not necessary for your particular situation.

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5.4 Contact Photo Form

(Chapter 5 - Contacts)



The Contact Photo Form enables you to assign/view a photo image associated with Contact records. This form can be opened by clicking on the Photo button located in the toolbar section of the Contact Detail Form. The Photo Form can also be opened from the right-click pop-up menu available from the Contacts Explorer .

CH2002 records only the filename associated with each Contact and does not actually store the image file in the CH2002 database. The image file must be created and saved onto your computer's hard drive by a third-party software program. All photo image files should be located in a single folder on your computer or network file server. You can specify this folder from the General Program Preferences screen ("Setup & Preferences | General Program Preferences). To choose a photo file to be applied to the Contact, use the "Photo Assign Button" .

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5.5 Contact Procedures

5.5.1 Contact Procedures

(Chapter 5 - Contacts)

Viewing Contact Records
Editing A Contact's Record
Searching For A Contact's Record
Adding A New Contact Record
Deleting A Contact's Record

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5.5.2 Viewing Contact Records

(Chapter 5 - Contacts)

Using the Contacts Explorer:

1. Activate the Contacts Explorer by selecting "Explorer Views | Contacts Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Contacts Explorer to display a desired filter set of Contact records in the right-hand side ListView control.
3. The ListView control displays Contact records with basic information (name, address, phone number, etc.). For more detailed information about a particular Contact record, double-click the Contact's name or right-click it and select "Open Contact" from the pop-up menu. Doing so will open the Contact record using the Contact Detail Form.

Using the Contact Detail Form:

1. You can open the Contact Detail Form by opening Contact's detail (through the Contacts Explorer - see above), or by selecting "Detail Views | Contact Detail" from the CH2002 Navigation Menu or top main menubar. From within the Contact Detail Form you can navigate to other Contact records using the record navigation buttons (arrow buttons) at the top of the Contact Detail Form or by selecting a Contact from the Contact Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select a Contact's name.

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5.5.3 Editing A Contact's Record

(Chapter 5 - Contacts)

1. Open the desired Contact record in the Contact Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Contact Detail Form to enable editing of the form.
3. Make the desired changes to the Contact's record.
4. When editing is complete, click the "Save" button  to save the changes you've made.

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5.5.4 Searching For A Contact's Record

(Chapter 5 - Contacts)

Using the Contacts Explorer:

1. Activate the Contacts Explorer by selecting "Explorer Views | Contacts Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Contacts Explorer to display a desired filter set of Contact records in the right-hand side ListView control.

   For example, let's say you were searching for a Contact who you knew was in the "Financial Contributors" Group Category. You could expand the "Category" node of the Contacts Explorer TreeView control and then click the "Financial Contributors" node. This will filter the Explorer's ListView control to display only Contact record's whose Category value equals "Financial Contributors". Using the TreeView control to filter the ListView control's data will make locating records much easier and more manageable as the number of records in your database grows.

3. The ListView control displays Contact records with basic information (name, address, phone number, etc.). For more detailed information about a particular Contact record, double-click the Contact's name or right-click it and select "Open Contact" from the pop-up menu. Doing so will open the Contact record using the Contact Detail Form.

Using the Contact Detail Form:

1. Open the Contact Detail Form by opening a Contact's record from the Contacts Explorer (see above) or by selecting "Detail Views | Contact Detail" from the CH2002 Navigation Menu or top main menubar.
2. Once you've opened the Contact Detail Form, you can navigate to other Contact records using the record navigation buttons (arrow buttons) at the top of the Contact Detail Form or by selecting a Contact from the Contact Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select a Contact's name. Additionally you can filter the Contact Detail Form to limit it to displaying on records meeting a specified criteria if you wish. To filter the form on a particular value, right-click the desired field and select one of the filtering options from the pop-up menu.

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5.5.5 Adding A New Contact Record

(Chapter 5 - Contacts)

You can begin the creation of a new Contact record in 3 ways:

1. **Contacts Explorer**: From the Contacts Explorer's toolbar, select the New Contact button  . This will open the Contact Detail Form to a new Contact record - ready for your data entry. When you are finished entering the Contact's data, click the Contact Detail Form's Save button  to save the new record.

2. **Contact Detail Form**: From the Contact Detail Form's toolbar, select the New Contact button  . This will place the form at a new (blank) Contact record - ready for your data entry. When you are finished entering the Contact's data, click the Contact Detail Form's Save button  to save the new record.

3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Contact". This will open the Contact Detail Form to a new Contact record - ready for your data entry. When you are finished entering the Contact's data, click the Contact Detail Form's Save button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

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5.5.6 Deleting A Contact's Record

(Chapter 5 - Contacts)

1. Open the desired Contact record in the Contact Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Contact Detail Form to enable editing of the form.
3. Delete the Contact record by clicking the Delete button  .
4. Select "Yes" at the delete confirmation prompt.

TIP: Deleting a Contact record will also delete any Contribution and Pledge records associated with the Contact. If the CH2002 security system is enabled, a user must have full write privileges to these related records (if they exist) before the Contact can be deleted.

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Chapter 6

6 Chapter 6 - Group Membership

6.1 Chapter 6 - Group Membership

Chapter 6 Sections:

- Groups Explorer
- Group Detail Form
- Group Procedures

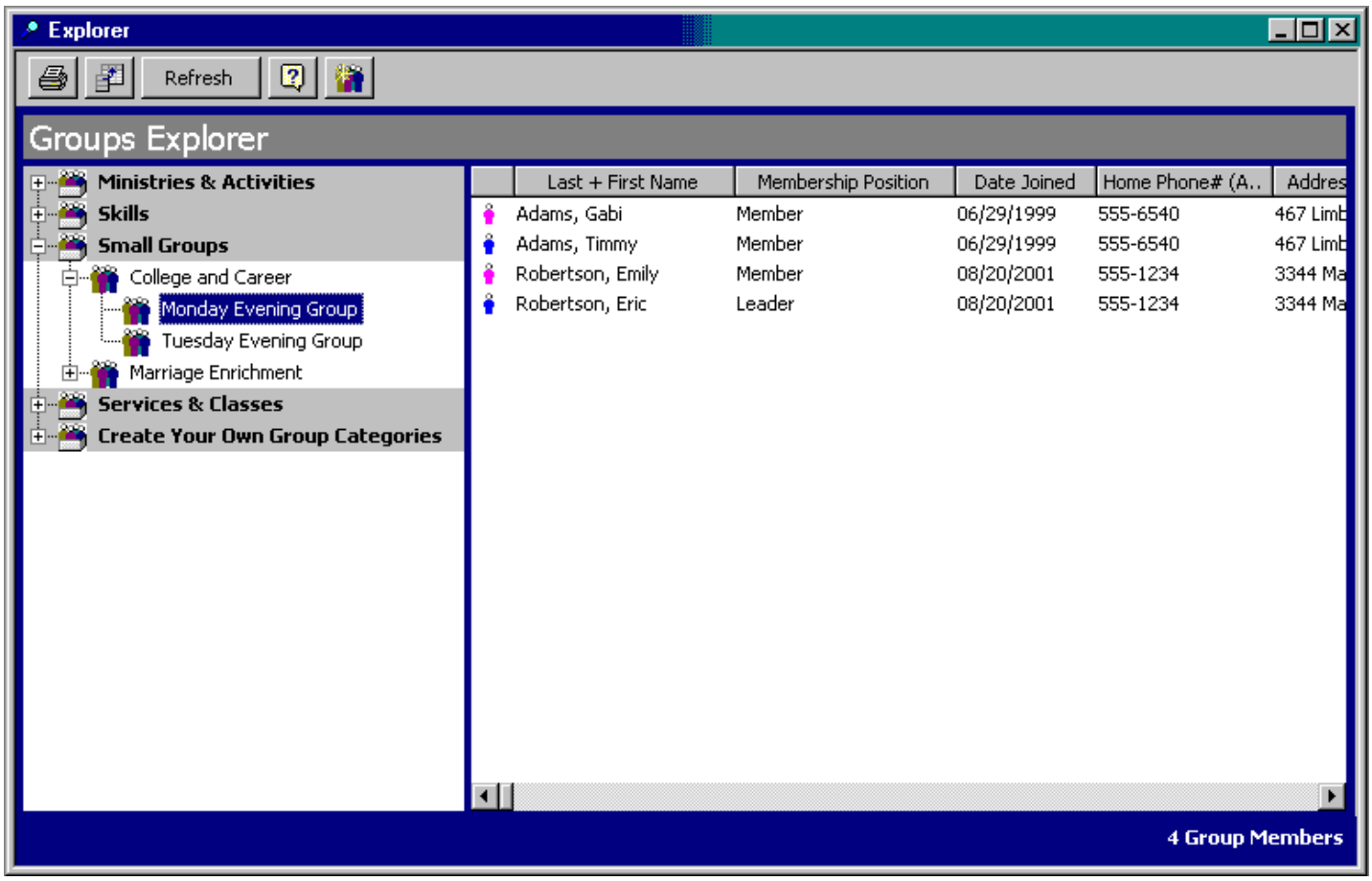
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6.2 Groups Explorer

(Chapter 6 - Group Membership)

To reach the Groups Explorer, select "Explorer Views | Groups Explorer" from the program's main menubar or from the Navigation Menu.

The Groups Explorer provides you a powerful visual representation of the Group and Group Membership records contained within your database. The Groups Explorer view is made up of 2 parts: the filter TreeView control on the left and the ListView data control on the right as shown below. The TreeView control displays Group names organized in their hierarchy structure. The ListView data control displays the Group members of the selected Group (the Group selected in the TreeView control).



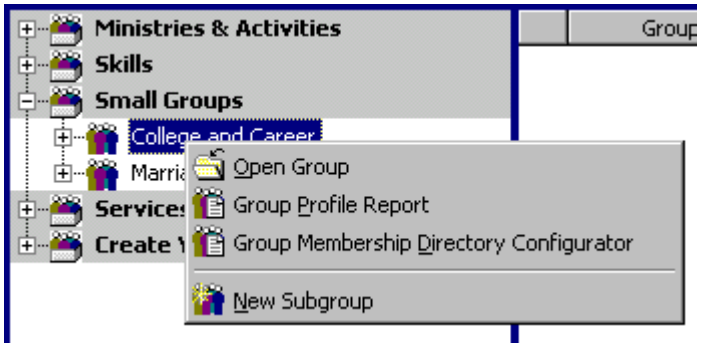
The CH2002 Group hierarchy structure consists of the following:
Group Category | Parent-level Group | Child-level Group

From the example screen-shot above, we see as an example:
Small Groups | *College and Career* | *Monday Evening Group*
(Group Category | Parent-level Group | Child-level Group)

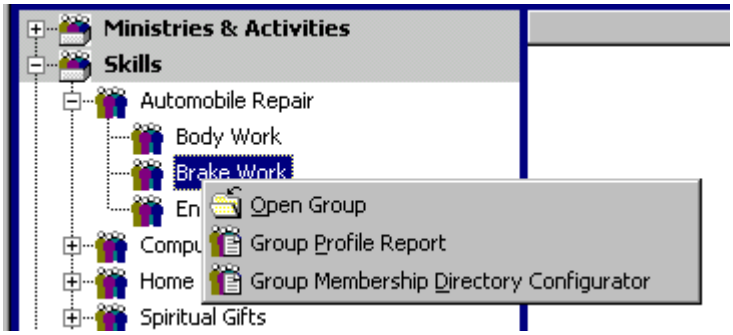
where "Small Groups" is the Category, "College and Career" is the Parent-level Group, and "Monday Evening Group" is the Child-level Group.

Right-clicking a Parent-level Group from the TreeView control (for example, "College and Career") will display a useful menu as shown below:

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Right-clicking a Child-level Group from the TreeView control (for example, "Brake Work") will display a slightly different pop-up menu as shown below:



TIP: As with all of the CH2002 Explorer Views, the Groups Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Group Detail Form .

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6.3 Group Detail Form

6.3.1 Group Detail Form

(Chapter 6 - Group Membership)

To reach the Group Detail Form:

- Select "Detail Views | Group Detail Form" from the program's main menubar or from the Navigation Menu.

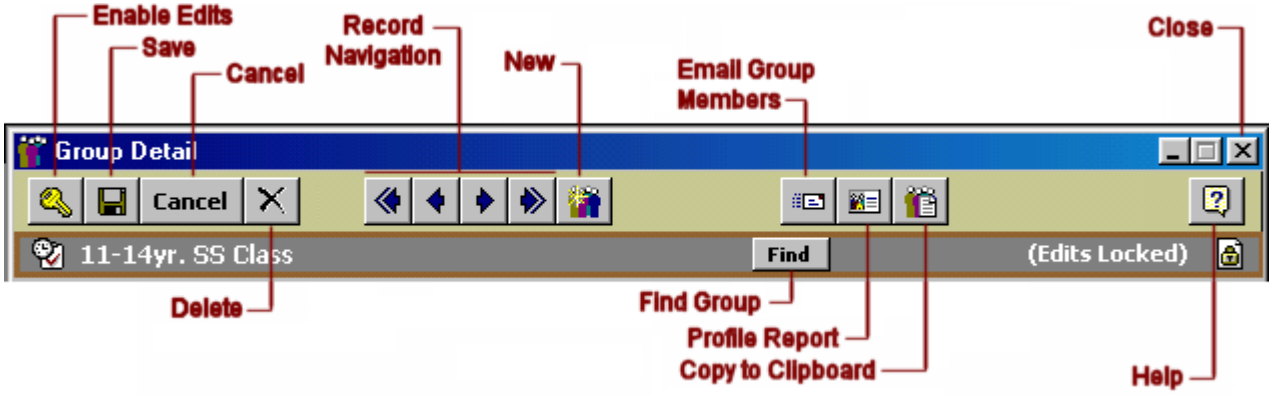
OR

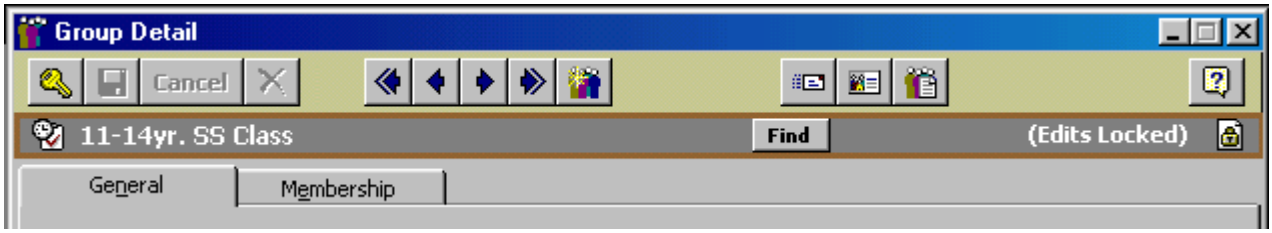
- From the Groups Explorer, either double-click on an individual from the right-hand side ListView control or choose "Open Group" from the Groups Explorer's right-click pop-up menu.

The Group Detail Form is used to manage Group and Group Membership records. This form will enable you to:

- Add new Group records
- Edit/Update Group records
- View Group details
- Delete Group records
- Assign/View Group Membership
- Generate a bulk email to all Group Members

The Group Detail Form's toolbar is shown below:



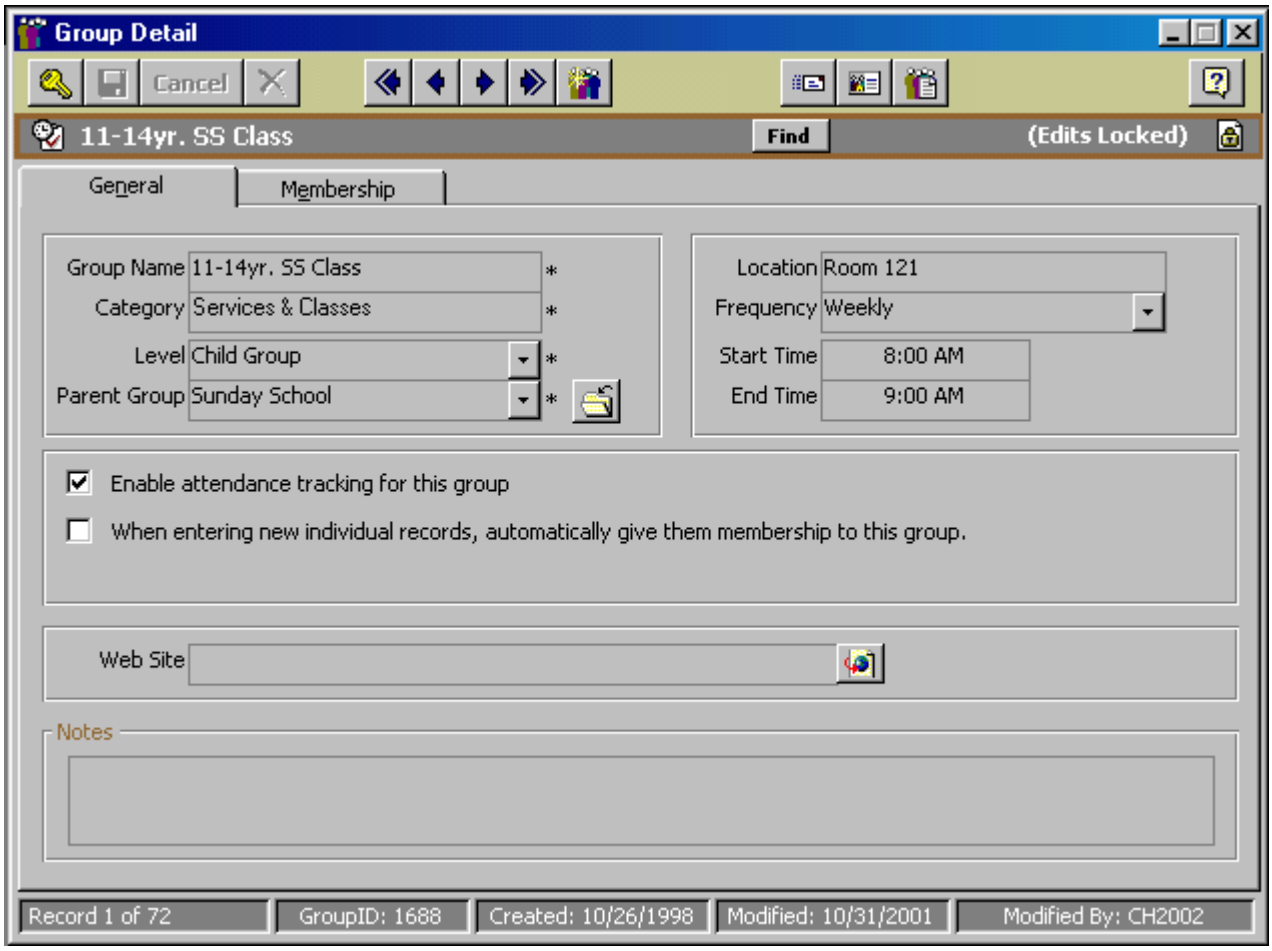


As shown above, the Group Detail Form is divided into the following "tabs" (sections):
"General" Tab, "Membership" Tab

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6.3.2 Group Detail Form - "General" Tab

(Chapter 6 - Group Membership)



This tab is where you'll define general information about the Group including its name, it's category, and whether or not it is a Parent or Child level group. You can also record details such as group meeting location, frequency and time.

If you want to be able to create Meeting records and track attendance for this Group, check the "Enable Attendance Tracking for this Group" checkbox. Doing so will include this Group in the Meetings Explorer.

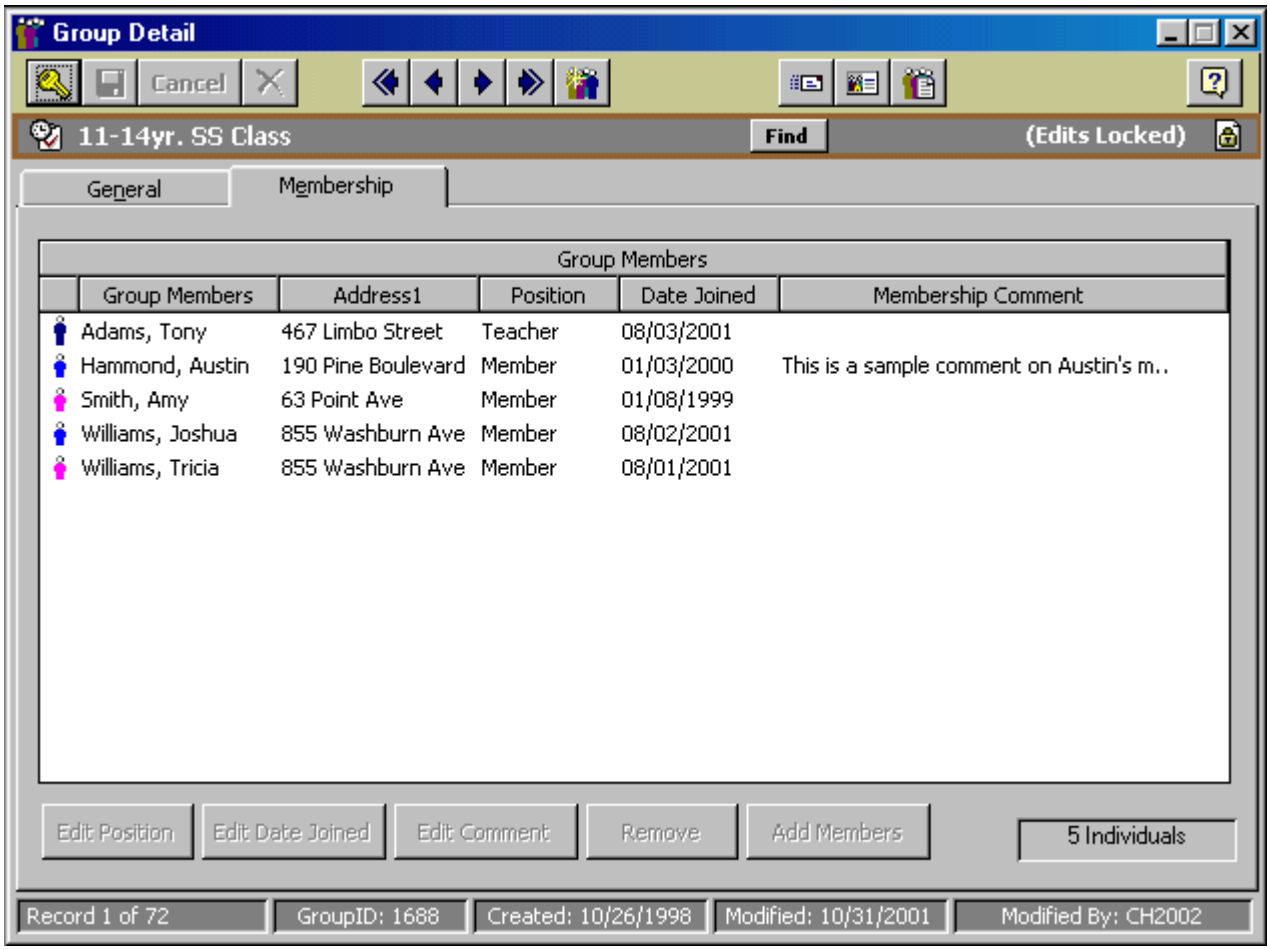
If you want new Individuals to be automatically given membership to this Group as they are added to the database, check the "When entering new individual records, automatically give them membership to this group" checkbox.

TIP: Only fields marked with an asterisk ("*") are required fields.

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6.3.3 Group Detail Form - "Membership" Tab

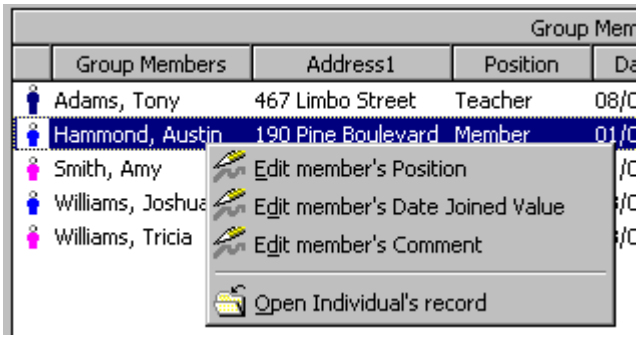
(Chapter 6 - Group Membership)



If the current Group is a Child level Group, then you will be able to make membership assignments to the Group (i.e. add or remove individuals from/to the Group). Membership assignments cannot be made to Parent level Groups.

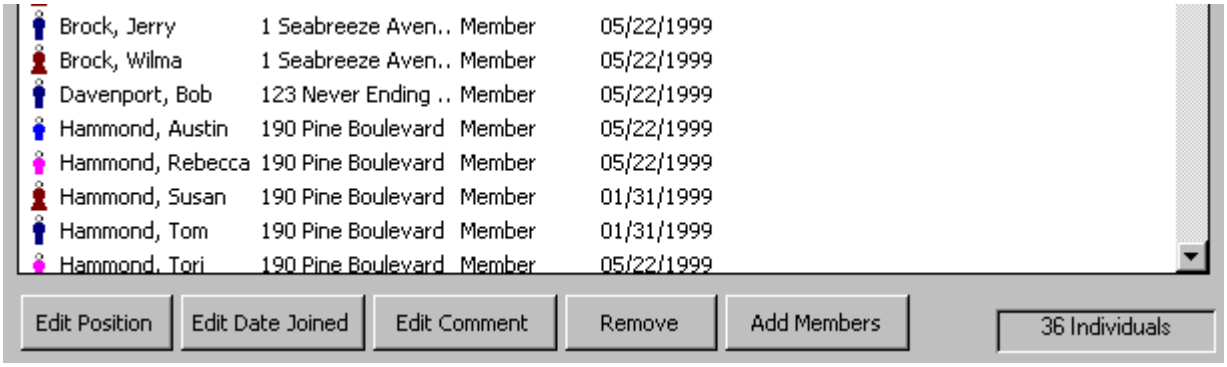
On the Membership tab, a ListView control displays the current members of the Group with their membership parameters (i.e. date joined, position, etc.).

When the Group Detail form is in Edit Mode, right-clicking an individual's name will display a pop-up menu as displayed below - allowing editing options for the individual's membership to the Group.



These editing options are also available as buttons along the bottom of the screen as shown below:

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Brock, Jerry 1 Seabreeze Aven.. Member 05/22/1999
Brock, Wilma 1 Seabreeze Aven.. Member 05/22/1999
Davenport, Bob 123 Never Ending .. Member 05/22/1999
Hammond, Austin 190 Pine Boulevard Member 05/22/1999
Hammond, Rebecca 190 Pine Boulevard Member 05/22/1999
Hammond, Susan 190 Pine Boulevard Member 01/31/1999
Hammond, Tom 190 Pine Boulevard Member 01/31/1999
Hammond, Tori 190 Pine Boulevard Member 05/22/1999
Edit Position
Edit Date Joined
Edit Comment
Remove
Add Members
36 Individuals

When using the right-click pop-up menu or the buttons along the bottom of the screen, multiple individual's can be edited at once by using the <Ctrl> button on the computer keyboard while selecting names with the left mouse button. Doing so will cause multiple individual names to become highlighted. When multiple names are highlighted, the editing of the membership options (for example, "Position") will be applied to all highlighted individuals.

To add additional individuals to the Group, use the "Add Members" button which is located along the bottom of the screen. Doing so will open the Group Membership - Add Members form.

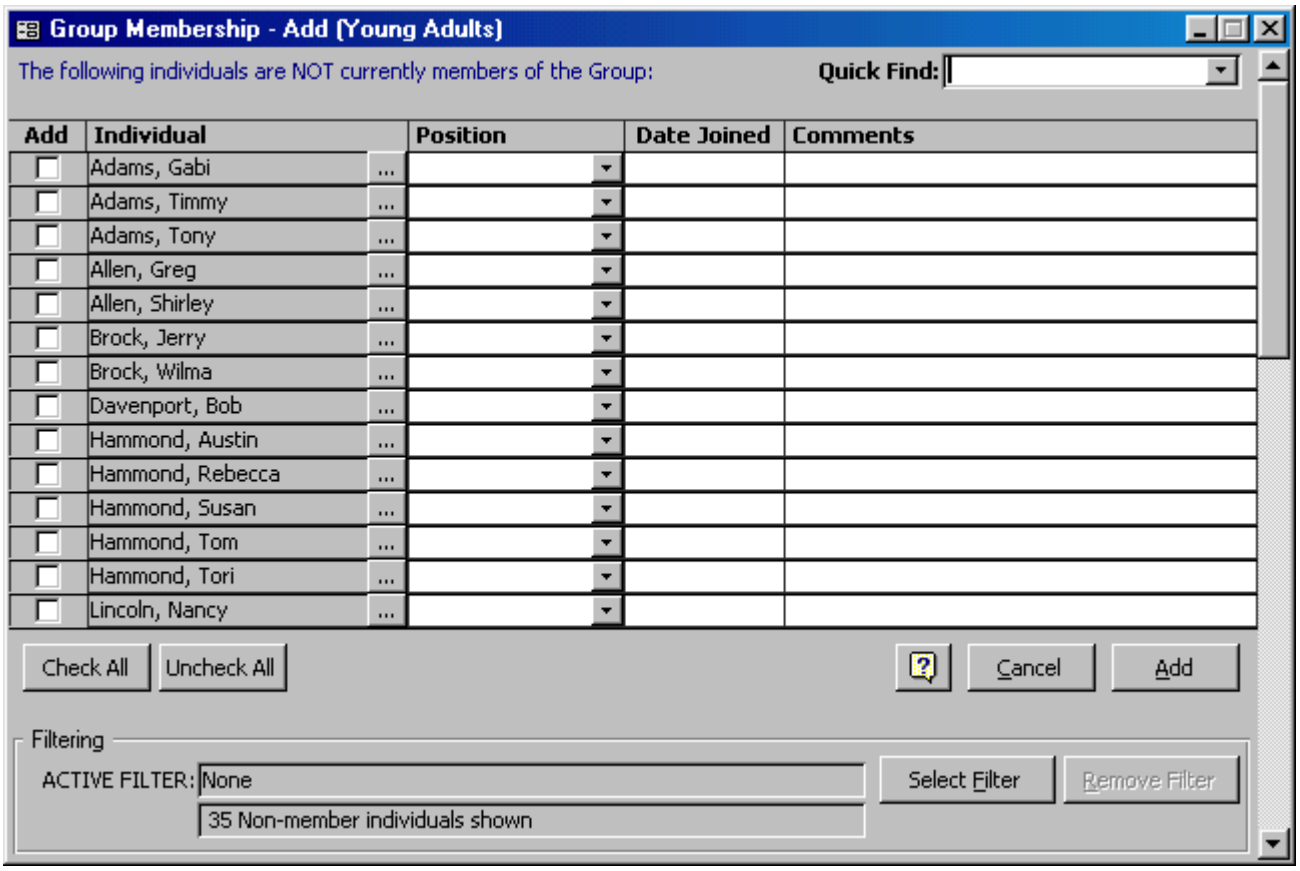
TIP: Group membership assignments can only be performed after the Enable Edits button (the button of a key) has been clicked in the Group Detail Form's toolbar.

TIP: To add or remove multiple Individuals to/from a single Group, the Group Detail Form is the form to use. However, to edit a single Individual's Group Membership to multiple Groups, the Individual Detail Form - "Groups" Tab should be used instead.

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6.3.4 Group Detail Form - Add Members

(Chapter 6 - Group Membership)



This screen is reached by clicking the "Add Members" button at the bottom of the Group Detail Form "Membership" Tab.

The individuals shown are currently NOT members of the Group. To add one or more of these individuals to the Group, check their "Add" checkbox and then click the "Add" button at the bottom of the form. You can also specify the Position, Date Joined, and Comments for each individual being added to the Group. In the upper right-hand corner of this screen, we've provided a "Quick Find" pull-down control. Selecting a name from the "Quick Find" pull-down will locate the selected individual's name in the non-member listing and set the "Add" checkbox.

When initially viewing this form, ALL individuals in the database who are not members of the Group will be displayed. To reduce the overall number of individuals being shown, there are filtering options located at the bottom of the form. Clicking on the "Select Filter" button will allow the user to choose from individual based filters created by the Custom Filter Builder. Utilizing a filter may make the Group Membership assignment process more efficient by making the non-member listing more manageable.

TIP: To add or remove multiple Individuals to/from a single Group, the Group Detail Form - Add Members is the form to use. However, to edit a single Individual's Group Membership to multiple Groups, the Individual Detail Form - "Groups" Tab should be used instead.

TIP: If you have non-member individuals who have identical names, it will not be obvious just by their name who is who. You can use the "..." button located to the right of the individual's name to display additional information about the individual (to help distinguish them).

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6.4 Group Procedures

6.4.1 Group Procedures

(Chapter 6 - Group Membership)

Viewing Groups and Group Membership
Editing A Group Record
Adding A New Group Record
Deleting A Group Record

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6.4.2 Viewing Groups and Group Membership

(Chapter 6 - Group Membership)

Using the Groups Explorer:

1. Activate the Groups Explorer by selecting "Explorer Views | Groups Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Groups Explorer to select the desired Group.
3. The ListView control displays Group Membership records associated with the selected Group (i.e. the names of the Individuals who are members of the Group) in the TreeView control.
4. To view details about the selected Group, right-click on the Group's name and select "Open Group" from the pop-up menu. Doing so will open the Group record using the Group Detail Form.

Using the Group Detail Form:

1. Once you've opened the Group Detail Form by opening a Group's detail (through the Groups Explorer - see above), you can navigate to other Group records using the record navigation buttons (arrow buttons) at the top of the Group Detail Form or by selecting a Group from the Group Detail Form's "Find" pull-down list. You can use the Ctrl+W shortcut key to activate this Find pull-down list to select a Group name.
2. Select the "Membership" tab of the Group Detail Form to view the names and details of the current Group members.

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6.4.3 Editing A Group Record

(Chapter 6 - Group Membership)

1. Open the desired Group record in the Group Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Group Detail Form to enable editing of the form.
3. Make the desired changes to the Group's record. If the Group is a "Child" level Group, you can use the Group Detail Form's "Membership" tab to view and assign Individuals' membership to the Group.
4. When editing is complete, click the "Save" button  to save the changes you've made.

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6.4.4 Adding A New Group Record

(Chapter 6 - Group Membership)

You can begin the creation of a new Group record in 3 ways:

1. **Groups Explorer**: From the Groups Explorer's toolbar, select the New Group button  . This will open the Group Detail Form to a new Group record - ready for your data entry. When you are finished entering the Group's data, click the Group Detail Form's Save button  to save the new record.
2. **Group Detail Form**: From the Group Detail Form's toolbar, select the New Group button  . This will place the form at a new (blank) Group record - ready for your data entry. When you are finished entering the Group's data, click the Group Detail Form's Save button  to save the new record.
3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Group". This will open the Group Detail Form to a new Group record - ready for your data entry. When you are finished entering the Group's data, click the Group Detail Form's Save button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

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6.4.5 Deleting A Group Record

(Chapter 6 - Group Membership)

1. Open the desired Group record in the Group Detail Form.
2. Click the "Unlock" button  at the top-left hand corner of the Group Detail Form to enable editing of the form.
3. Delete the Group record by clicking the Delete button  .
4. Select "Yes" at the delete confirmation prompt.

TIP: Deleting a Group record will also delete any Group Membership records associated with the Group.

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Chapter 7

7 Chapter 7 - Contributions

7.1 Chapter 7 - Contributions

Chapter 7 Sections:

- Contributions Explorer
- Contribution Batch Detail Form
- Contribution Procedures
- CH2002 & QuickBooks

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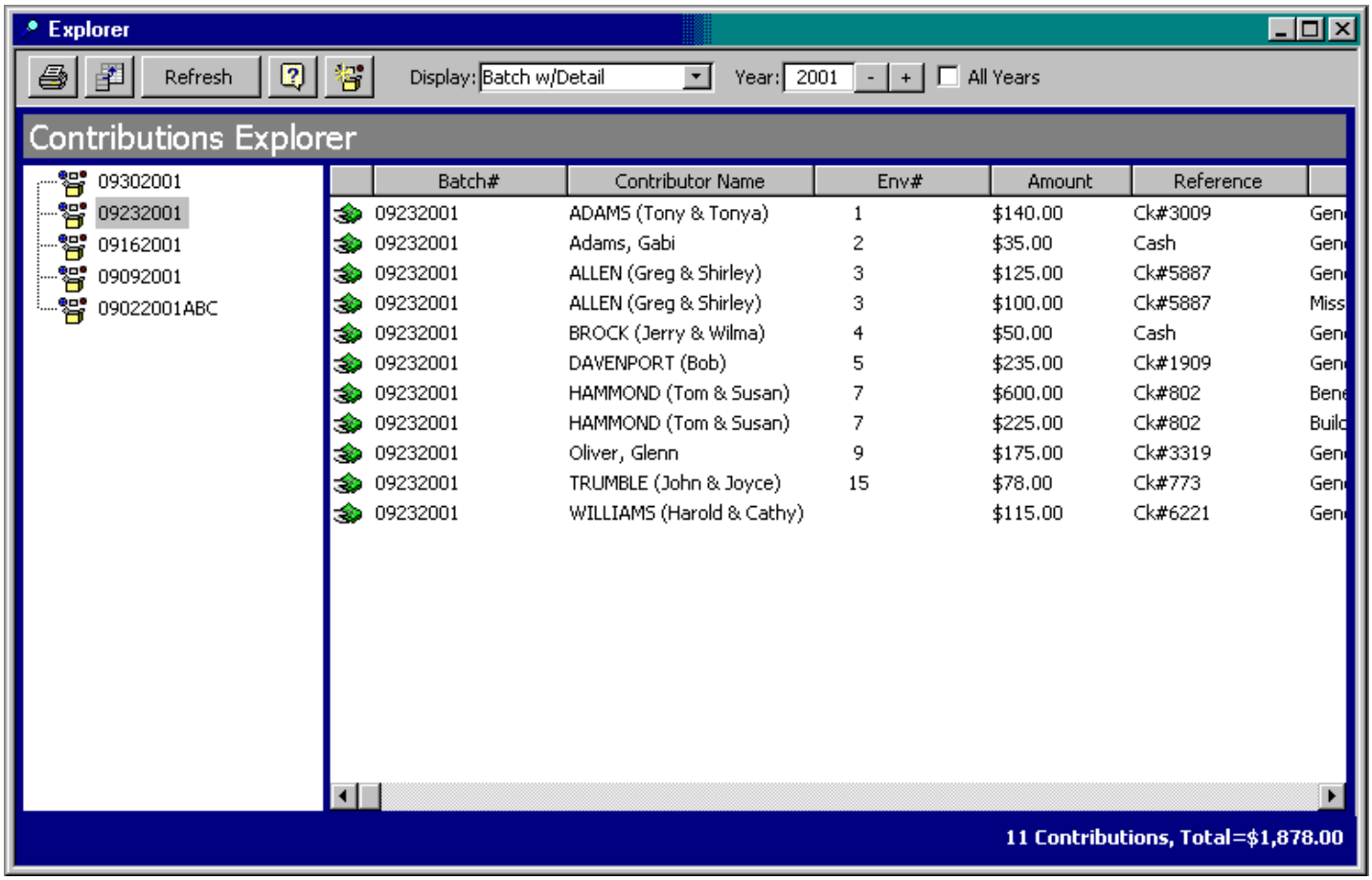
7.2 Contributions Explorer

(Chapter 7 - Contributions)

To reach the Contributions Explorer, select "Explorer Views | Contributions Explorer" from the program's main menubar or from the Navigation Menu.

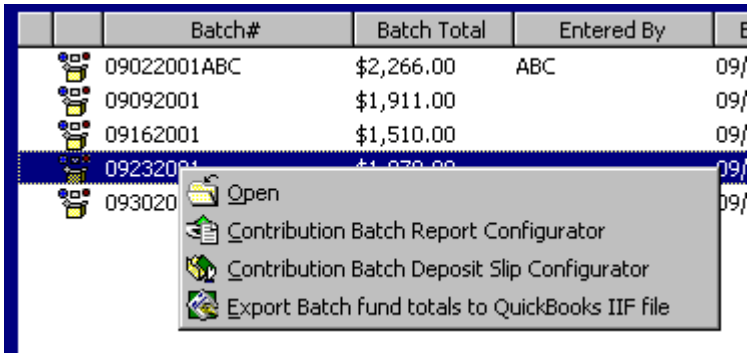
The Contributions Explorer provides you a powerful visual representation of the Contribution records contained within your database. The Contributions Explorer provides several display options using the "Display" pull-down control located in the toolbar section. These display options allow you to browse Contribution records in various insightful ways. For example, the screen shot below of the Contributions Explorer is displaying "Batch w/Detail" and has Batch# "09232001" selected in the left-hand TreeView control. The right ListView control displays all of the Contribution records contained in this selected Batch.

Normally the Contributions Explorer will default to only displaying Contribution records for the current calendar year. However, the "Year" pull-down and "All Years" checkbox can be used to alter this.


Explorer
Refresh
Display: Batch w/Detail
Year: 2001
All Years
Contributions Explorer
09302001
09232001
09162001
09092001
09022001ABC
Batch# Contributor Name Env# Amount Reference
09232001 ADAMS (Tony & Tonya) 1 $140.00 Ck#3009
09232001 Adams, Gabi 2 $35.00 Cash
09232001 ALLEN (Greg & Shirley) 3 $125.00 Ck#5887
09232001 ALLEN (Greg & Shirley) 3 $100.00 Ck#5887
09232001 BROCK (Jerry & Wilma) 4 $50.00 Cash
09232001 DAVENPORT (Bob) 5 $235.00 Ck#1909
09232001 HAMMOND (Tom & Susan) 7 $600.00 Ck#802
09232001 HAMMOND (Tom & Susan) 7 $225.00 Ck#802
09232001 Oliver, Glenn 9 $175.00 Ck#3319
09232001 TRUMBLE (John & Joyce) 15 $78.00 Ck#773
09232001 WILLIAMS (Harold & Cathy) $115.00 Ck#6221
11 Contributions, Total=$1,878.00

Right-clicking on a Batch# from the Contributions Explorer will display the following useful pop-up menu:

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TIP: You can designate the default value for the Contribution Explorer's "Display" pull-down control on the CH2002 General Program Preferences - "Contributions" Tab.

TIP: As with all of the CH2002 Explorer Views, the Contributions Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Contribution Batch Detail Form.

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7.3 Contribution Batch Detail Form

7.3.1 Contribution Batch Detail Form

(Chapter 7 - Contributions)

To reach the Contribution Batch Detail Form:

- Select "Detail Views | Contribution Batch Detail Form" from the program's main menubar or from the Navigation Menu.

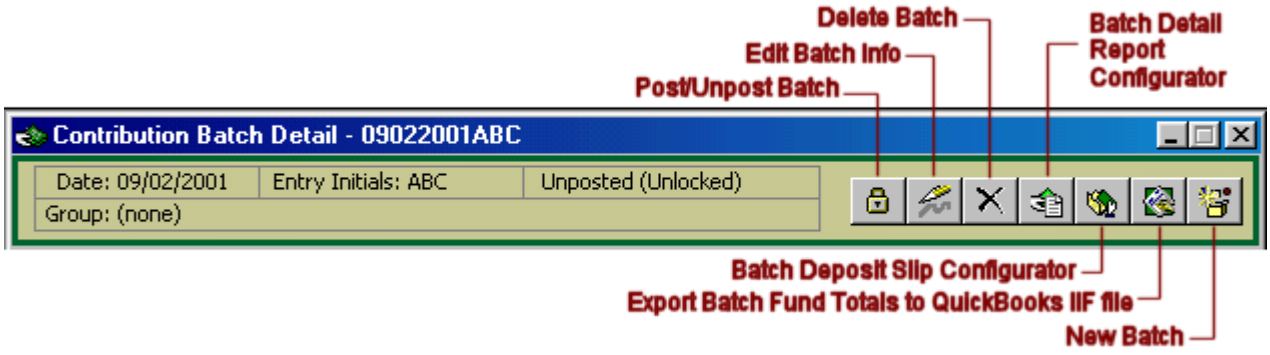
OR

- From the Contributions Explorer, right-click on a Batch# and choose "Open" from the right-click pop-up menu.

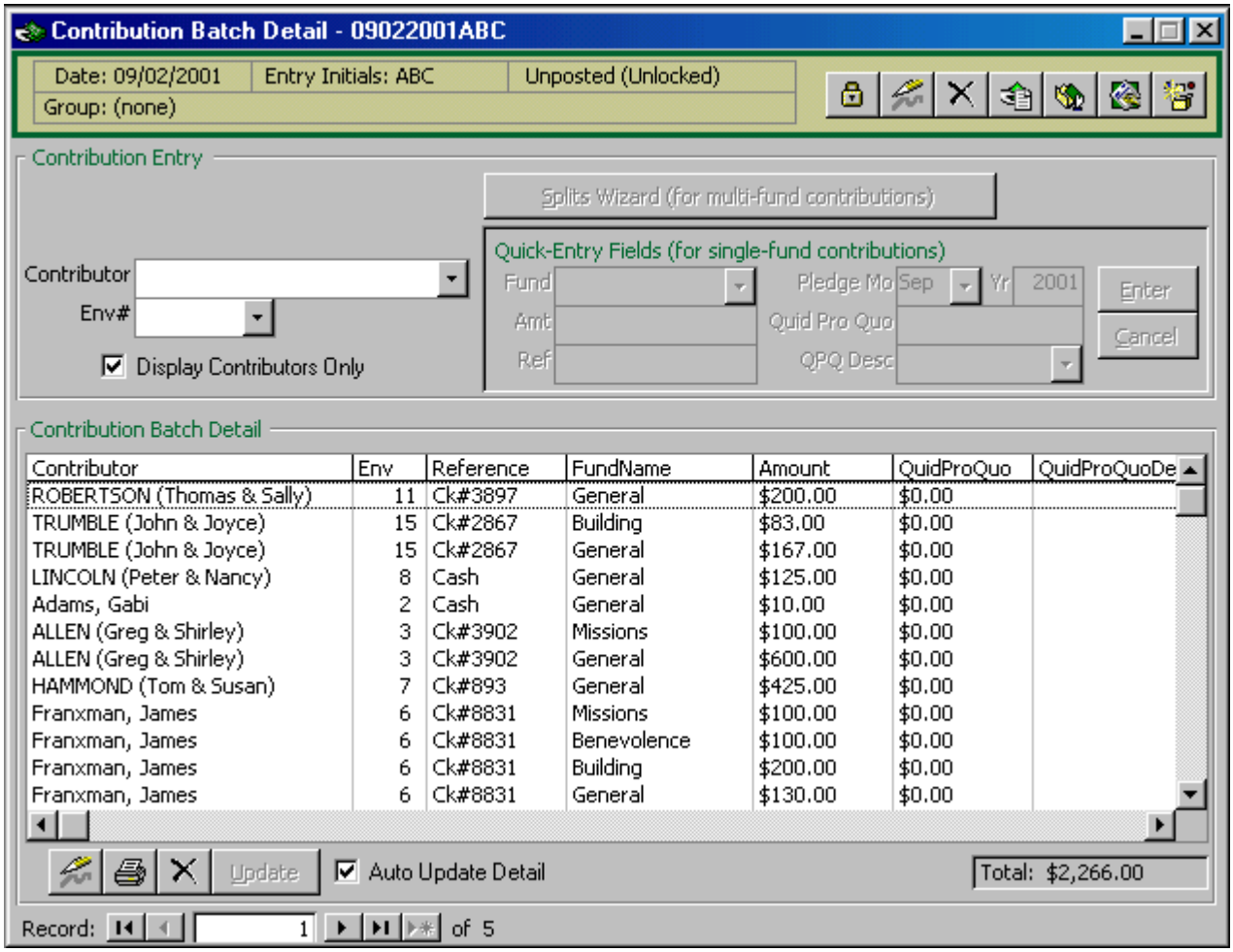
The Contribution Batch Detail Form is used to manage Contribution records. This form will enable you to:

- Add new Contribution Batch records
- Edit/Update Contribution Batch records
- View Contribution Batch details
- Delete Contribution Batch records
- Assign/View Batch Contribution Records

The Contribution Batch Detail Form's toolbar is shown below:



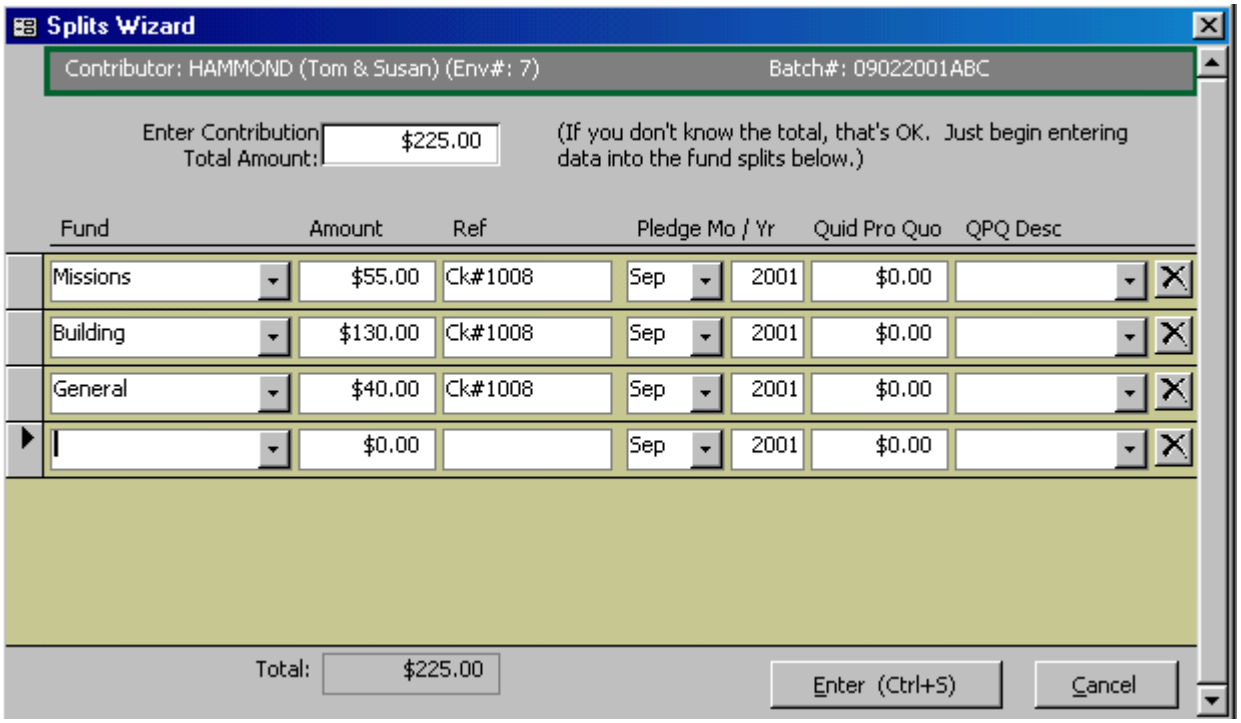
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Contribution Batch Detail - 09022001ABC
Date: 09/02/2001
Entry Initials: ABC
Unposted (Unlocked)
Group: (none)
Contribution Entry
Splits Wizard (for multi-fund contributions)
Contributor
Env#
Display Contributors Only
Quick-Entry Fields (for single-fund contributions)
Fund
Amt
Ref
Pledge Mo
Sep
Yr
2001
Quid Pro Quo
QPQ Desc
Enter
Cancel
Contribution Batch Detail
Contributor | Env | Reference | FundName | Amount | QuidProQuo | QuidProQuoDe
ROBERTSON (Thomas & Sally) | 11 | Ck#3897 | General | $200.00 | $0.00
TRUMBLE (John & Joyce) | 15 | Ck#2867 | Building | $83.00 | $0.00
TRUMBLE (John & Joyce) | 15 | Ck#2867 | General | $167.00 | $0.00
LINCOLN (Peter & Nancy) | 8 | Cash | General | $125.00 | $0.00
Adams, Gabi | 2 | Cash | General | $10.00 | $0.00
ALLEN (Greg & Shirley) | 3 | Ck#3902 | Missions | $100.00 | $0.00
ALLEN (Greg & Shirley) | 3 | Ck#3902 | General | $600.00 | $0.00
HAMMOND (Tom & Susan) | 7 | Ck#893 | General | $425.00 | $0.00
Franxman, James | 6 | Ck#8831 | Missions | $100.00 | $0.00
Franxman, James | 6 | Ck#8831 | Benevolence | $100.00 | $0.00
Franxman, James | 6 | Ck#8831 | Building | $200.00 | $0.00
Franxman, James | 6 | Ck#8831 | General | $130.00 | $0.00
Update
Auto Update Detail
Total: $2,266.00
Record: 1 of 5

***"Contribution Entry"* Section:**
This is where you add new Contribution records to the Batch. Once added to the Batch, Contributions will appear in the ListBox control in the "Contribution Batch Detail" section of the form.

The Contribution Batch Detail form provides 2 means to enter Contribution records. For Contributions which involve multiple funds (for example, John contributes $225 and he wants $55 to go to the Missions fund, $130 to go to the Building fund, and the rest to the General fund), then you'd want to utilize the Splits Wizard. The Splits Wizard (shown below) provides a convenient method of entering in multi-fund Contributions. To enter a Contribution record using the Splits Wizard, select the Contributor from the Contribution Batch Detail form's "Contributor" or "Env#" pull-down lists and then click on the Splits Wizard button. Then use the Splits Wizard to split the Contribution to the appropriate Contribution funds. If you know the total overall Contribution amount, you'll want to enter this value into the "Enter Contribution Total Amount" field. The Splits Wizard will then automatically adjust the amounts for each split value to make sure that the math works out properly. If you don't know the exact total Contribution (for example, John contributes $87.49 to the missions fund, $39.29 to the Building fund, and $123.45 to the General fund, but does give you a total Contribution amount), just go ahead and enter in the individual amounts for each fund and the Splits Wizard will automatically total them up for you.

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If you are entering a simple single-fund Contribution record (for example, Mary contributes $300 to the Building fund), then you can utilize the "Quick Entry Fields" of the Contribution Batch Detail form. Just select the contributor from the "Contributor" or "Env#" pull-down lists and then tab over to the Quick Entry Fields. You could, of course, utilize the Splits Wizard for a single-fund Contribution record, but it is slightly faster to utilize the fields in the "Quick Entry Fields" section for handling single-fund contributions.

Whether the Splits Wizard or the Quick Entry Fields method is chosen to enter a contribution, the first step is to identify the Contributor. The Contribution must be identified using either the "Contributor" pull-down control or the "Env#" pull-down control. If the "Display Contributors Only" checkbox is checked, then the Contributor and Env# pull-down controls will only include Households, Individuals, and Contacts who have been specified as Contributor Types. Unchecking this checkbox will remove this restriction so that a contribution from a Household, Individual, or Contact who has not been configured as a Contributor Type can still be recorded.

***"Contribution Batch Detail"* Section:**
This section of the Contribution Batch Detail form contains a ListBox control which displays all of the Contribution records included in the current Batch. The listing of contributions contained in the Batch is sorted by order of entry.

TIP: A "Batch" is simply a collection of Contribution records. All Contributions contained in a Batch share a common date.

TIP: You can utilize Batch records however works best for you and your church. Some churches will find that creating a Batch for each contribution date fits their needs. Others will find that maintaining multiple Batches for each date (one for each individual service meeting and/or data entry person) best meets their organizational needs.

TIP: For most efficient data entry, you should configure your Household, Individual, and Contact records to indicate which of these records are "Contributor Types". The "Contributor" and "Env#" pull-down controls can be configured (using the "Display Contributors Only" checkbox) to included only Contributor Type Household, Individual, and Contact

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records.

TIP: Batches can be "Posted" using the Post/UnPost button in the form's toolbar area. A Batch that is posted cannot be deleted or modified in any way. However, a Batch can be unposted to re-enable modification.

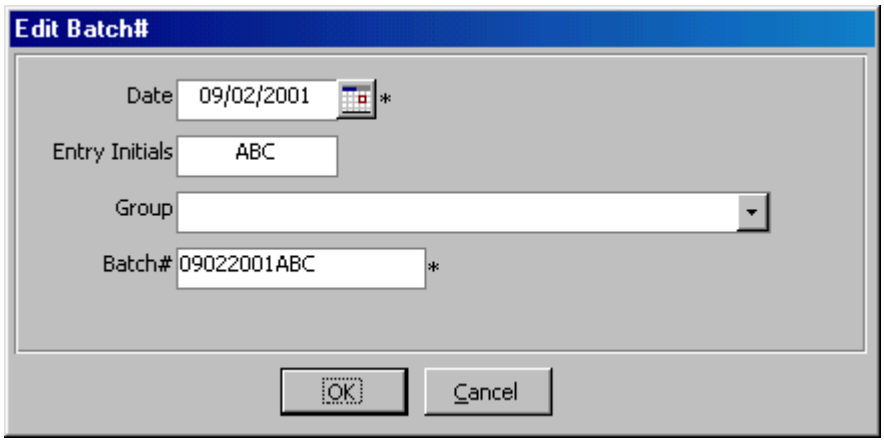
TIP: The Quid Pro Quo amount of a Contribution is the good faith estimate of the value of the goods or services that the contributor received in return for their contribution. The IRS does not consider the Quid Pro Quo portion of a contribution to be tax deductible. For example, let's suppose the youth group at your church sponsored a Valentine's Day dinner dance and sold ticket's for $50 per couple. The ticket sales from the dance is going to be used to help with the construction costs of the your church's youth center. If you estimate the value of the dinner to actually be $30 (the Quid Pro Quo value), then the actual tax deductible amount that the contributor could claim as a charitable contribution on his/her tax return would be $50 - $30 = $20 (total contribution - Quid Pro Quo value). The Quid Pro Quo fields can be disabled (hidden) through Contributions Setup.

TIP: When entering contribution records, you can specify a Pledge Month and Pledge Year. If you are utilizing Pledges in CH2002, these fields provides flexibility in terms of apply the contribution against a contributor's Pledge. The Pledge Month and Pledge Year fields default to the Month and Year of the date of the Batch. However, you can alter these default values to indicate that the contributor would like the contribution applied to a different month/year pledge. Take for example a contribution of $100 towards the Building fund received from John Smith on Dec 15, 2001. John has indicated that his contribution should be applied to his Jan 2002 Building fund pledge. However, John wants to pre-pay his pledge payment in December 2001 to receive income tax benefits for his 2001 tax return. You would want to record John's contribution in a Dec 15, 2001 Batch, but you would want to adjust the Pledge Month/Year value to 1/2002. When Pledge variance reports are generated by CH2002, the program utilizes the Pledge Month and Pledge Year fields of each contribution record to determine the contributions applied to the pledge. So, in our example, John's 2001 Contribution Statement report would include his $100 contribution (since it was entered into a Dec 2001 Batch) - and his 2002 Building Fund Pledge statement indicates that $100 was applied to his Pledge in Jan 2002.

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7.3.2 Contribution Batch Edit Form

(Chapter 7 - Contributions)



The Contribution Batch Edit Form is used to edit basic details about a Contribution Batch record (Date, entry initials, associated Group, and Batch number). This form will allow you to:

- Add new Contribution Batch records
- Edit/Update Contribution Batch records

You can reach this form in 2 ways: by editing an existing Batch record or by creating a new Batch record.

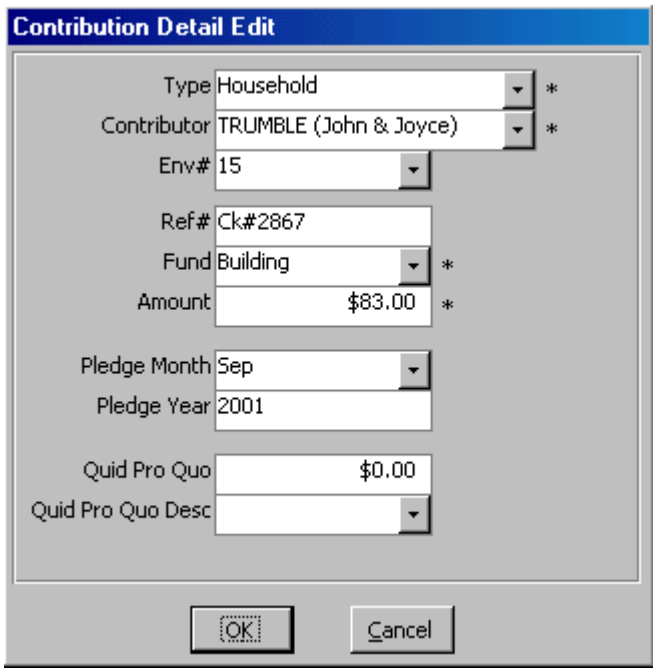
To edit an existing Batch record, you can reach this form by selecting the "Edit Batch Info" button in the toolbar section of the Contribution Batch Detail Form.

TIP: Only fields marked with an asterisk ("*") are required fields.

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7.3.3 Contribution Detail Edit Form

(Chapter 7 - Contributions)



You can use this form to edit Contribution records which have already been added to a Batch. To reach this form, double-click a Contribution record from the Contribution Batch Detail Form ListBox control.

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7.4 Contribution Procedures

7.4.1 Contribution Procedures

(Chapter 7 - Contributions)

Viewing Contribution Records
Editing A Contribution Batch
Adding A New Contribution Batch
Deleting A Contribution Batch
Editing A Contribution Record
Adding A New Contribution Record
Deleting A Contribution Record

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7.4.2 Viewing Contribution Records

(Chapter 7 - Contributions)

1. Activate the Contributions Explorer by selecting "Explorer Views | Contributions Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select a desired item from the "Display" pull-down list located in the Explorer's toolbar. (The value selected here will affect what is displayed in the Explorer's left-hand ListView control).
3. Select an item from the left-hand ListView control by clicking it. Once an item has been selected here, the right-hand ListView control will display all related Contribution records for the selected item.

To open the Contribution Batch for editing and/or viewing, right-click on any Contribution record and select "Open Contribution's Batch#" from the pop-up menu or double-click a Batch# when displayed in the left-hand ListView control.

Example: *View all recorded Contribution records which were given during 2001 towards the "Building" Fund*

- Open the Contributions Explorer
- Select "By Fund" from the Display pull-down list
- Select "2001" from the Year pull-down list
- Click on the "Building" Fund from the left-hand ListView control

The right-hand ListView control will now display the desired Contribution records.

TIP: You can specify the default settings for the "Display" pull-down lists from theContributions tab of the General Preferences screen.

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7.4.3 Editing A Contribution Batch

(Chapter 7 - Contributions)

1. Activate the Contributions Explorer by selecting "Explorer Views | Contributions Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select "Batch Summary" from the "Display" pull-down list located in the Explorer's toolbar section.
3. Select the appropriate value from the Year pull-down list located in the Explorer's toolbar section.
4. Right-click the desired Batch# and select "Open" from the pop-up menu or simply double-click the Batch# to open the Batch record in the Contribution Batch Detail Form.
5. To edit basic details of the Batch record, click the "Edit Batch Info" button  from the toolbar. This will open the Edit Batch Info dialog box. Here you can edit the Date, Entry Initials, and associated Group for the Batch record (the Date is the only required field).
6. To edit details of a specific Contribution record contained in a Batch, right-click the desired Contribution record from the Contribution Batch Detail form's ListBox control and select "Edit" from the pop-up menu. This will open the Contribution Detail Edit dialog box. Here you can edit the contributor, the reference#, the fund, the amount, etc.

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7.4.4 Adding A New Contribution Batch

(Chapter 7 - Contributions)

You can begin the creation of a new Contribution Batch in 3 ways:

1. **Contributions Explorer**: From the Contributions Explorer's toolbar, select the New Batch button  . This will open the New Batch# dialog box. Here you can enter in the basic information about the Batch record (Date, initials of the data entry person, and an associated Group - only the Date value is required).

2. **Contribution Batch Detail Form**: From the Contribution Batch Detail Form's toolbar, select the New Batch button  . This will open the New Batch# dialog box. Here you can enter in the basic information about the Batch record (Date, initials of the data entry person, and an associated Group - only the Date value is required).

3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Contribution Batch". This will open the New Batch# dialog box. Here you can enter in the basic information about the Batch record (Date, initials of the data entry person, and an associated Group - only the Date value is required).

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7.4.5 Deleting A Contribution Batch

(Chapter 7 - Contributions)

1. Activate the Contributions Explorer by selecting "Explorer Views | Contributions Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select "Batch Summary" from the Display pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Right-click the desired Batch# and select "Open Batch" from the menubar or double-click the Batch# in the ListView control to open the Batch record in the Contribution Batch Detail Form.
5. To delete the Batch record, click the Delete Batch button  at the top of the form.
6. Select Yes at the deletion confirmation prompt.

TIP: Deleting a Batch record will also delete any and all Contribution records which have been assigned to the Batch record.

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7.4.6 Editing A Contribution Record

(Chapter 7 - Contributions)

1. Open the Batch record containing the desired Contribution record in the Contribution Batch Detail Form.
2. Locate the desired Contribution in the Contribution Batch Detail form's ListView control and right-click it. Select "Edit" from the pop-up menu. This will open the Contribution Detail Edit dialog box. Here you can edit the contributor, the reference#, the fund, the amount, etc.

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7.4.7 Adding A New Contribution Record

(Chapter 7 - Contributions)

1. Activate the Contributions Explorer by selecting "Explorer Views | Contributions Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select "Batch Summary" from the Display pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Double-click the desired Batch record to which you'd like to add the new Contribution. This will open the selected Batch record in the Contribution Batch Detail form.
5. Use the "Contribution Entry" section of the Contribution Batch Detail form to enter the new Contribution record.

The Contribution Batch Detail form provides 2 means to enter Contribution records. For Contributions which involve multiple funds (for example, John contributes $100 and he wants $30 to go to the Building fund and the rest to the General fund), then you'd want to utilize the Splits Wizard. The Splits Wizard provides a convenient method of entering in multi-fund Contributions. To enter a Contribution record using the Splits Wizard, select the Contributor from the Contribution Batch Detail form's "Contributor" or "Env#" pull-down lists and then click on the Splits Wizard button. Then use the Splits Wizard to split the Contribution to the appropriate Contribution funds. If you know the total overall Contribution amount, you'll want to enter this value into the "Enter Contribution Total Amount" field. The Splits Wizard will then automatically adjust the amounts for each split value to make sure that the math works out properly. If you don't know the exact total Contribution (for example, John contributes $87.49 to the missions fund, $39.29 to the Building fund, and $123.45 to the General fund, but does give you a total Contribution amount), just go ahead and enter in the individual amounts for each fund and the Splits Wizard will automatically total them up for you.

If you're entering a simple single-fund Contribution record (for example, Mary contributes $300 to the Building fund), then you can utilize the "Quick Entry Fields" of the Contribution Batch Detail form. Just select the contributor from the "Contributor" or "Env#" pull-down lists and then tab over to the Quick Entry Fields. You could, of course, utilize the Splits Wizard for a single-fund Contribution record, but it is slightly faster to utilize the fields in the "Quick Entry Fields" section for handling single-fund contributions.

TIP: When entering in a new Contribution, you can either select the Contributor using the "Contributor" pull-down list or the "Env#" pull-down list.

TIP: For fastest data entry, use your keyboard's Tab key to navigate between the data fields and buttons in the "Contribution Entry" section. To activate a highlighted button, press the Enter key. To open (expand) a pull-down list from the keyboard, press the Alt key and Down Arrow key together when the pull-down list is highlighted (is the active control). Use the arrow keys to move between items in the pull-down list's list. Use the Enter key to select the highlighted value from a pull-down list.

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7.4.8 Deleting A Contribution Record

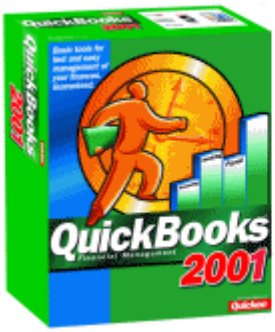
(Chapter 7 - Contributions)

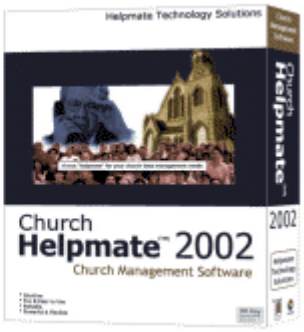
1. Activate the Contributions Explorer by selecting "Explorer Views | Contributions Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select desired value from the Display pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Double-click the desired Batch record containing the Contribution record you would like to delete. This will open the selected Batch record in the Contribution Batch Detail form.
5. Locate the desired Contribution in the Contribution Batch Detail form's ListBox control and right-click it. Select "Delete" from the pop-up menu.
6. Select Yes to the deletion confirmation prompt.

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7.5 CH2002 & QuickBooks

(Chapter 7 - Contributions)





Introduction:

While the Church Helpmate™ 2002 church management software system provides extensive capabilities to record, track, and report your church's contribution and pledge records, it does not contain a full financial accounting system (general ledger, accounts payables, chart of accounts, payroll, etc.). Instead, we have designed the CH2002 system to integrate easily with Intuit's QuickBooks ® accounting software (America's #1 accounting software package).

While many of our competitors provide their own accounting modules, we feel strongly that our development of an accounting program would not benefit the majority of our clients. In many ways, we would be "reinventing the wheel" by doing so. In addition, though we are very skilled at software design, development, and support, we are not accounting specialists. In order to properly design, develop, and support a proprietary accounting program, we would have to train and hire accounting specialists to assist us. This would lead to increased overhead and ultimately higher costs for our current software products and services - and it would drain our resources away from our core competencies. The QuickBooks ® accounting program has long been a leader in this area, chosen by thousands upon thousands of businesses and non-profit organizations. It is a mature, proven product that is used, supported, and maintained by accounting professionals worldwide.
The purpose of this document is to describe (in detail) how the CH2002 contribution module is able to integrate with the QuickBooks ® accounting program.1

Overview of the CH2002 / QuickBooks® Integration:

Shown below is the 3-step process involved in the CH2002 /QuickBooks ® integration:

1. In Church Helpmate™ 2002, enter all of the contribution details for a particular date – for example, on November 26, 2001 John Smith contributed $200 to the Building Fund.
2. In Church Helpmate™ 2002, export the contribution fund summary totals for the contributions entered in CH2002 – for example, on November 26, 2001 the church received $8200 towards the General Operating Fund, $7512 towards the Building Fund, and $2900 towards the Missions Fund. CH2002 will export this data to an Intuit Interchange Format file (IIF).
3. In QuickBooks ®, import the IIF file created by CH2002 to add the fund summary totals as a line item in your QuickBooks check register.

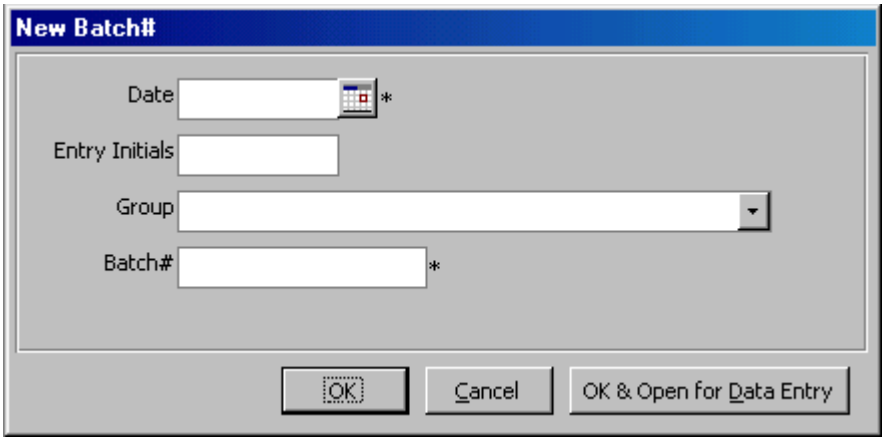
Using this method, you will be recording the detail in CH2002 (i.e. on November 26, 2001 John Smith contributed $200 to the Building Fund) and the fund summary totals in QuickBooks (i.e. on November 26, 2001 the church received $7512 towards the Building Fund).

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Details of the CH2002 / QuickBooks® Integration:

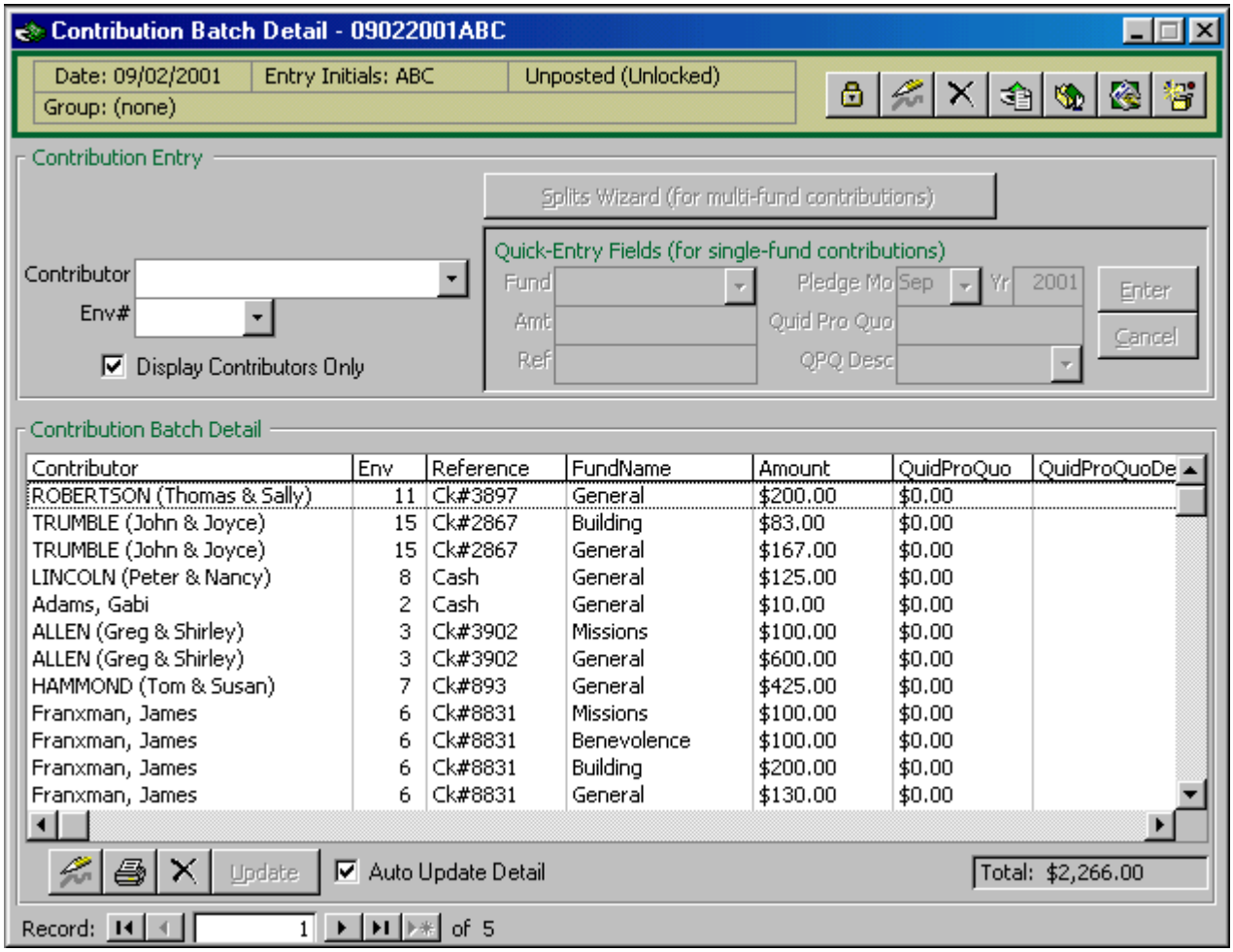
Outlined below are the detailed steps involved in integrating the Church Helpmate™ 2002 contribution data into your QuickBooks register:

1. **In CH2002, create a Contribution Batch record and enter Contribution records into the Batch.**
   CH2002 utilizes Contribution *Batch* records to organize your contribution records. You might think of a batch record as a bucket used to hold contribution records. A batch record has a specific date associated with it. Therefore all contribution records placed in the batch record will have the same date. To create a new Batch record, select "File | New | Contribution Batch" from the CH2002 main menubar. The following screen will appear and prompt you for details on the new Batch.



   When you first create a Batch record, it will be empty (it will hold no contribution records). You can then begin entering your contribution records into the Batch (i.e. *John Smith contributed $200 to the Building Fund*). There is no limit to the number of contributions and fund designations you can enter into the batch. However, keep in mind that all contributions in a batch must have the same date. A "screen-shot" of the CH2002 Contribution Batch Detail form is shown below (this is the form where contribution records are added to a batch).

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Contribution Batch Detail - 09022001ABC
Date: 09/02/2001
Entry Initials: ABC
Unposted (Unlocked)
Group: (none)
Contribution Entry
Splits Wizard (for multi-fund contributions)
Quick-Entry Fields (for single-fund contributions)
Contributor
Env#
Display Contributors Only
Fund
Amt
Ref
Pledge Mo
Sep
Yr
2001
Quid Pro Quo
QPQ Desc
Enter
Cancel
Contribution Batch Detail
Contributor | Env | Reference | FundName | Amount | QuidProQuo | QuidProQuoDe
ROBERTSON (Thomas & Sally) | 11 | Ck#3897 | General | $200.00 | $0.00
TRUMBLE (John & Joyce) | 15 | Ck#2867 | Building | $83.00 | $0.00
TRUMBLE (John & Joyce) | 15 | Ck#2867 | General | $167.00 | $0.00
LINCOLN (Peter & Nancy) | 8 | Cash | General | $125.00 | $0.00
Adams, Gabi | 2 | Cash | General | $10.00 | $0.00
ALLEN (Greg & Shirley) | 3 | Ck#3902 | Missions | $100.00 | $0.00
ALLEN (Greg & Shirley) | 3 | Ck#3902 | General | $600.00 | $0.00
HAMMOND (Tom & Susan) | 7 | Ck#893 | General | $425.00 | $0.00
Franxman, James | 6 | Ck#8831 | Missions | $100.00 | $0.00
Franxman, James | 6 | Ck#8831 | Benevolence | $100.00 | $0.00
Franxman, James | 6 | Ck#8831 | Building | $200.00 | $0.00
Franxman, James | 6 | Ck#8831 | General | $130.00 | $0.00
Update
Auto Update Detail
Total: $2,266.00
Record: 1 of 5

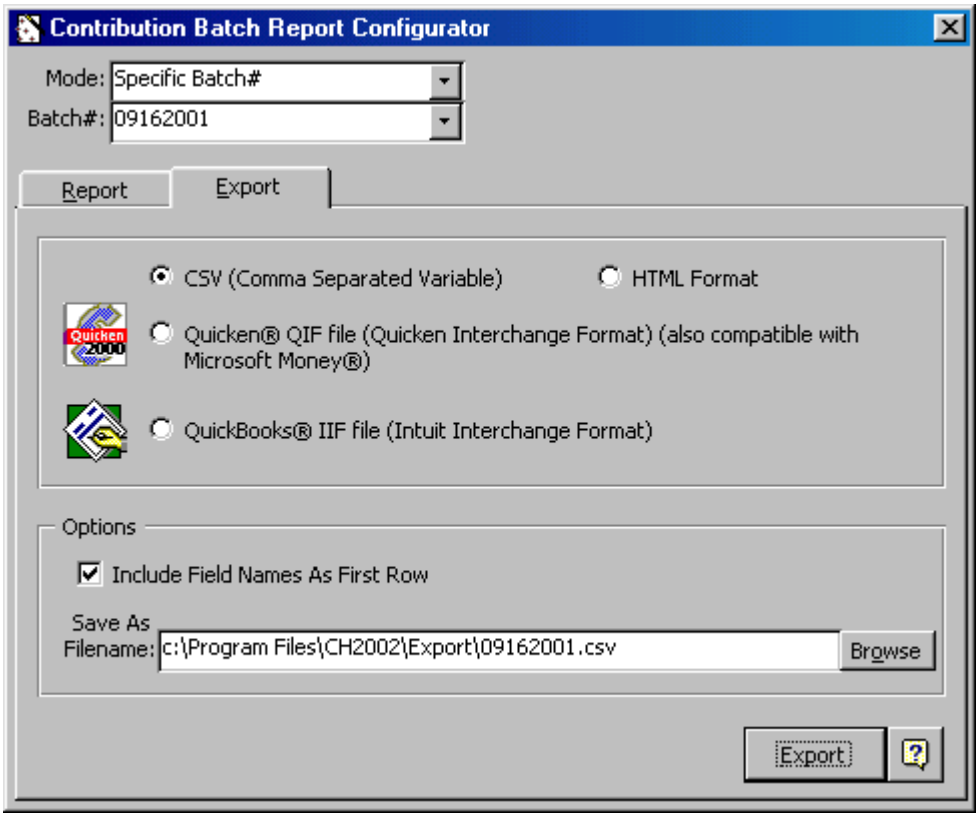
2. In CH2002, export the Contribution Fund Summary totals.

Once you have completed entering contribution records into the Batch, you are now ready to export the data to a file that can be imported into QuickBooks®. There are several ways you can initiate this export process:

- From the Contribution Batch Detail form: Click the QuickBooks® button in the toolbar section of the Contribution Batch Detail form.
- From the Contributions Explorer: Right-click on the desired Batch record, and select "Export Batch fund totals to QuickBooks® IIF file" from the pop-up menu.

Initiating the process by either of the above methods will open the Contribution Batch Report Configurator (shown below) and automatically set the necessary parameters for you. If you want, you can modify the exported file's path and/or filename. You can specify the default folder path to your QuickBooks® installation in the CH2002's Contribution Preferences screen. To perform the export, click the "Export" button in the lower-right hand corner of the form. Once the export process has been completed, a confirmation dialog box will be displayed.

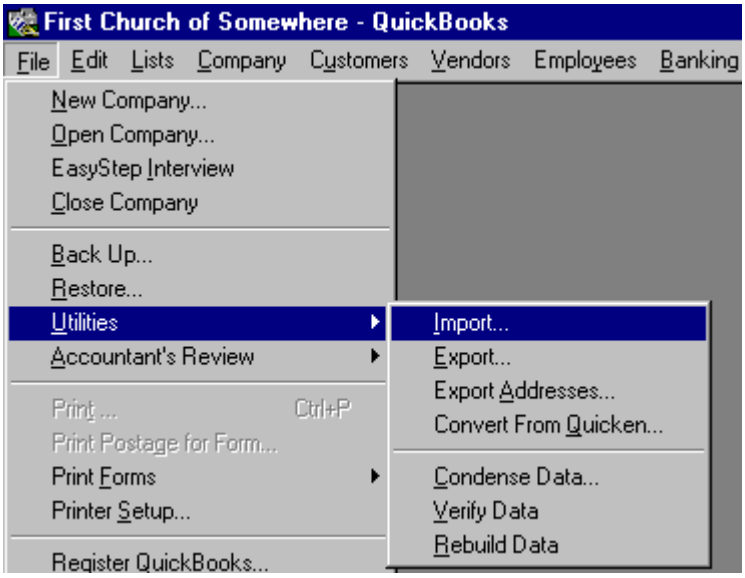
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NOTE: If this is your first time exporting to an IIF file, you will be asked to enter the name of the QuickBooks® checking account you would like the money to be deposited into. For example, "Checking" or "Your Bank Checking" ….just be sure that the name you enter here matches the name you've given this checking account in QuickBooks®. Once you've entered the name of the desired checking account, CH2002 will not prompt you again for this information (the program will store your entry for use in future exports). If you need to modify this checking account name, you can do so using the CH2002 Preferences screen ("Setup & Preferences | General Program Preferences | Contributions Tab").

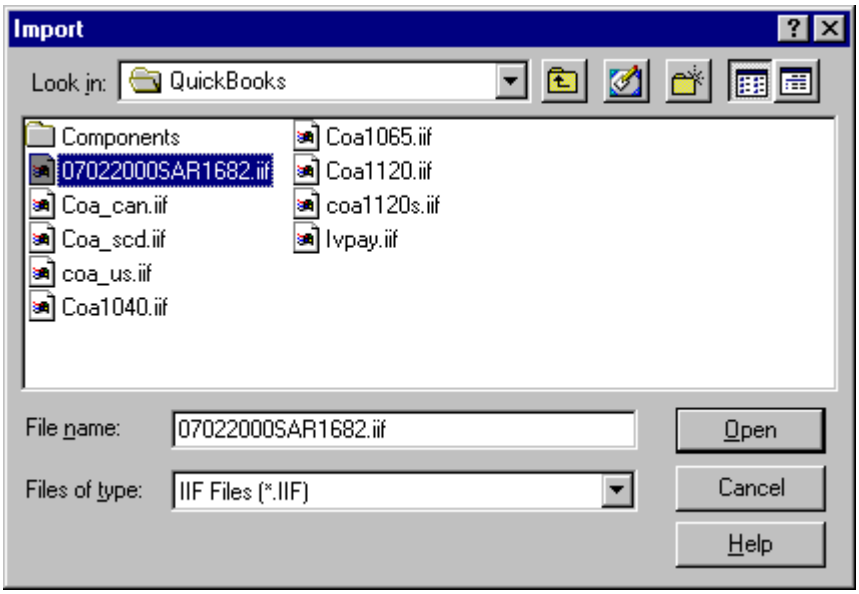
3. In QuickBooks®, import the IIF file.

From the QuickBooks® menubar, select "File | Utilities | Import" as shown below.



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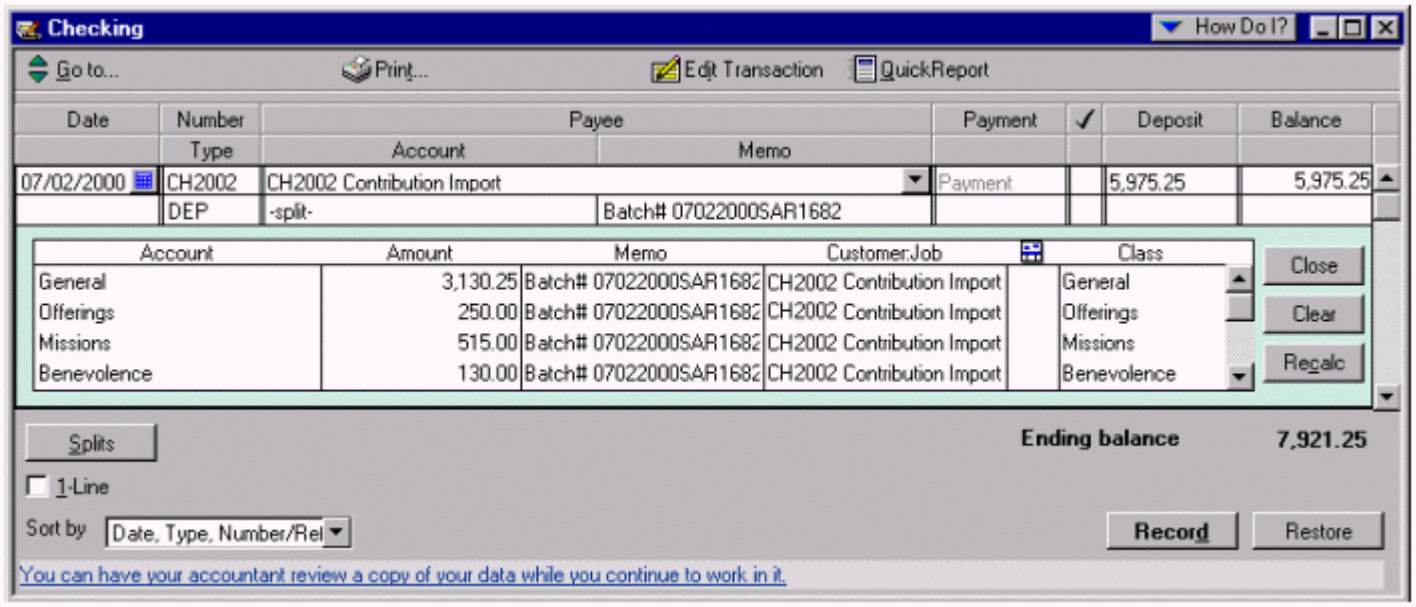
Selecting "Import" will open an Import dialog box where you'll choose the desired IIF file to import as shown below:



Once the import process is complete, you will see the following confirmation message:



The imported data will appear as a deposit entry in your QuickBooks® register as shown on the following page:



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As you can see from the example above, the contribution fund totals are handled in QuickBooks® as "splits" to a single deposit transaction. The deposit transaction is identified as a CH2002 Contribution Import and the CH2002 Batch# is included in the deposit transaction's memo line. The date of the deposit transaction will be the date of the Batch record. If this is not the desired date, it can be easily modified in the QuickBooks® register.

The contribution funds that you've setup in CH2002 (i.e. General, Offerings, Building, Missions, etc.) should be represented in QuickBooks® as Income accounts. If your CH2002 exported IIF file contains contributions to a fund that does not already exist in QuickBooks® as an Income account, it will automatically be created for you during the import process. Also, you'll notice the "Class" column in the register entry above. QuickBooks® classes give you a convenient way to separate income and expenses for each fund. When you set up each fund as a class, you can see a profit and loss report by fund, as well as detailed transaction reports. QuickBooks® also allows you to see how much money you have in each fund, or several funds together. This is in addition to reports on your overall organization. If you do not have a class already defined in QuickBooks® for each of your income funds, they will be created automatically for you during the import process.

NOTE: It is very important that you maintain the identical names (i.e. same spelling) for your Fund income accounts and Classes in QuickBooks® with your contribution fund names in Church Helpmate™ 2002 .

What Are The Benefits To You?

The Church Helpmate™ 2002 's ability to integrate with QuickBooks® provides you with the following benefits:

- A state-of-the-art church management software system designed specifically to handle your church's membership, group/class activity, contribution, pledges, meeting, attendance, and visitation records.... yet is not over-priced and under-supported by a software manufacturer who must also handle the complex and demanding issues associated with designing, developing, and supporting a proprietary accounting software system.

- An industry-leading accounting software system that requires very little accounting knowledge...yet is powerful enough to handle demanding needs of thousands of businesses and non-profit organizations worldwide.

- In many churches today, a volunteer or other individual who is remote from the church office handles the accounting system. Utilizing separate membership (CH2002) and accounting (QuickBooks®) systems supports this distributed system. For example, the church secretary who enters the CH2002 contribution data at the church office can easily email or deliver on floppy disk the CH2002 contribution export files (IIF files) to their treasurer who maintains the church's financial records in QuickBooks® from their home office.

- Reduces chance of error by automating the contribution deposit process into QuickBooks® - potentially saving many hours of tedious error-locating procedures.

Questions & Answers:

Q: As a church, I was told that I need a "fund accounting" system – and that QuickBooks® was not a fund accounting program. Is this true?

A: As a church, you undoubtedly have several "funds" that you keep track of (for example, your "Building" fund, your "Missions" fund, your "General Operating" fund, etc.). In most cases, you do not have a separate bank account (i.e. checking or savings account) for each of these funds. The money associated with these funds is "lumped" together many times into a single checking account. However, you need to be able to track and report on the financial status of these funds individually (for example, what income and expense transactions occurred last month for the "Missions" fund?). Without a capable accounting program, this would be quite cumbersome and likely impossible to achieve. QuickBooks® "classes" provides a simple and convenient way to separate income and expenses for each fund – to provide the needed fund tracking and reporting. When you set up each fund as a "class", you can see a profit and loss report by fund, as well as detailed transaction reports. QuickBooks® also allows you to see how much money you have in each fund, or several funds together. This is in addition to reports on your overall church.

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Q: Our church is using an accounting software package other than QuickBooks®. What options do we have?

A: If you are using Quicken® or Microsoft Money®, Church Helpmate™ 2002 can also export the Batch fund summary totals to a QIF (Quicken Interchange Format) file rather than an IIF file. QIF files can be imported into Quicken®, Microsoft Money® and several other money management software packages. Simply choose the "Quicken® QIF file" option during the CH2002 export process (rather than the IIF file option). If your accounting software package does not support either the IIF or QIF file formats, then you'll need to enter the Batch fund summary totals into your accounting software manually. Really this is very simple. When you are finished with a CH2002 contribution Batch, generate a Batch summary report that displays the summary totals of the Batch grouped by funds (for example, $7512 towards the Building Fund, $5560 towards the Missions fund, etc.). In your accounting software, you would then enter a deposit transaction for each of the funds listed on this report and their summary totals. The number of manual entries necessary would therefore be the number of funds contributed to in the Batch. In typical scenarios, this would mean you would have less than half-dozen entries to process.

Q: Aren't there advantages to having an "all-in-one" church management software system that contains both a membership AND an accounting module?

A: Yes…and no. An "all-in-one" system would essentially eliminate the "Step 3" in the CH2002/QuickBooks® integration process - which is the import process into QuickBooks®. Since the CH2002 program cannot itself write to the QuickBooks® data file, this simple import step is necessary. An all-in-one system is able to write (or "post") the data directly from the contribution module to the accounting module. While this may at first seem like an advantage, you may really be putting yourself (and your church) at a disadvantage in terms of flexibility and overall cost – as compared to the CH2002/QuickBooks® system. Why? Because this system empowers your church with 2 state-of-the-art tools designed specifically to be the best at their specific purpose: CH2002 – for membership and contribution, and QuickBooks® for accounting. In our experience, all-in-one solutions that provide the necessary power and flexibility are extremely expensive, while affordable all-in-one solutions are disappointing in terms of their ease-of-use, power, and flexibility (especially in the areas of payroll, receivables, payables, and online banking).

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Chapter



8 Chapter 8 - Pledges

8.1 Chapter 8 - Pledges

Chapter 8 Sections:

- Pledges Explorer
- Pledge Detail Form
- Pledge Procedures

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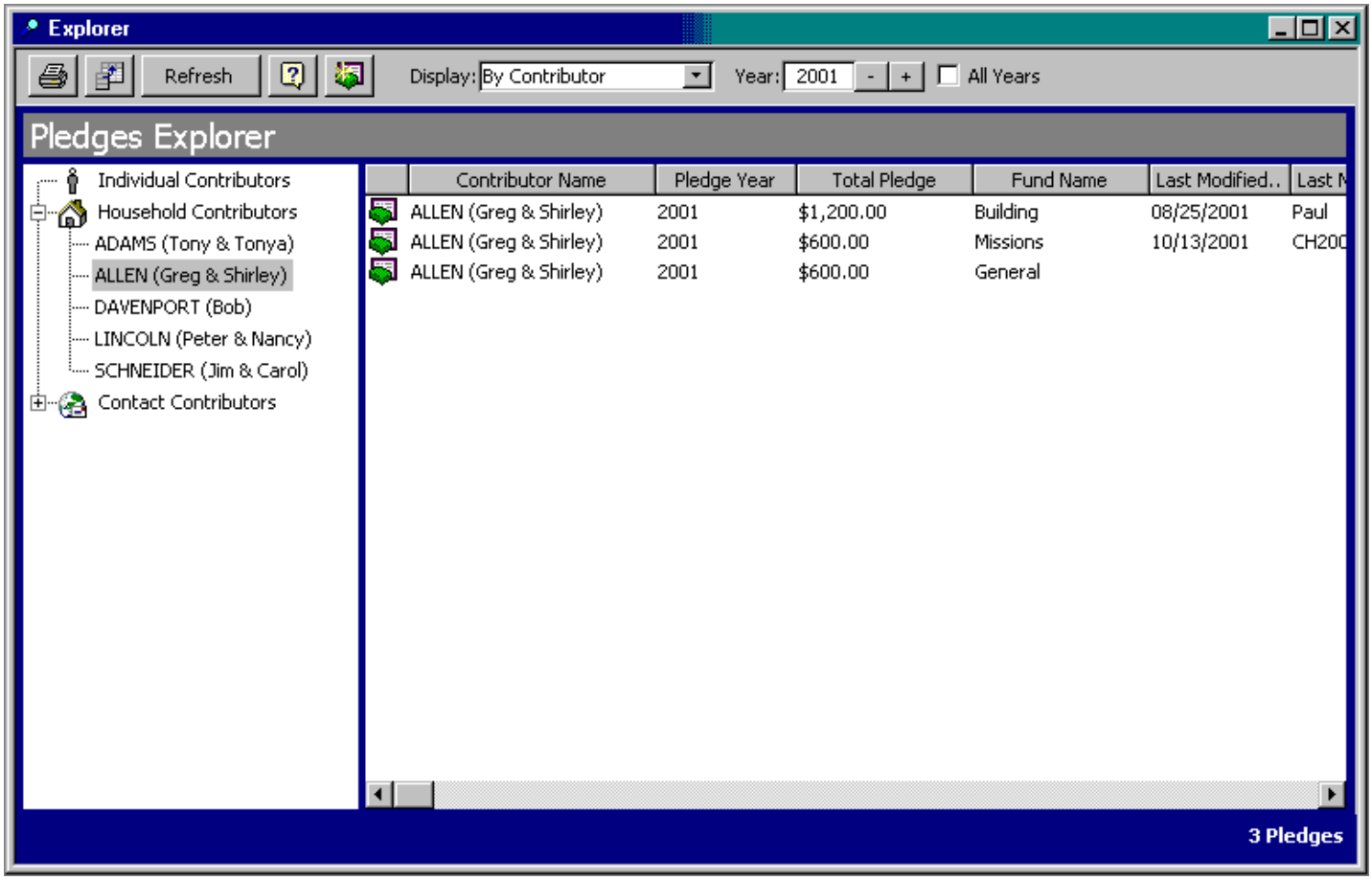
8.2 Pledges Explorer

(Chapter 8 - Pledges)

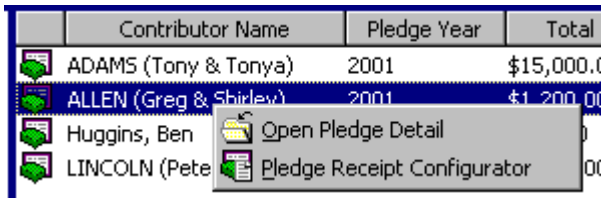
To reach the Pledges Explorer, select "Explorer Views | Pledges Explorer" from the program's main menubar or from the Navigation Menu.

The Pledges Explorer provides you a powerful visual representation of the Pledge records contained within your database. The Pledges Explorer provides several display options using the "Display" pull-down control located in the toolbar section. These display options allow you to browse Pledge records in various insightful ways. For example, the screen shot below of the Pledges Explorer is displaying "by Contributor" and has the "ALLEN (Greg & Shirley)" household selected in the left-hand TreeView control. The right ListView control displays all of the Pledge records for this household for the year 2001.

Normally the Pledges Explorer will default to only displaying Pledge records for the current calendar year. However, the "Year" pull-down and "All Years" checkbox can be used to alter this.



Right-clicking a Pledge record from the ListView Data control will display a useful menu as shown below:



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TIP: You can designate the default value for the Pledges Explorer's "Display" pull-down control on the CH2002 General Program Preferences - "Pledges" Tab.

TIP: As with all of the CH2002 Explorer Views, the Pledges Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Pledge Detail Form.

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8.3 Pledge Detail Form

(Chapter 8 - Pledges)

To reach the Pledge Detail Form:

- Select "Detail Views | Pledge Detail Form" from the program's main menubar or from the Navigation Menu.

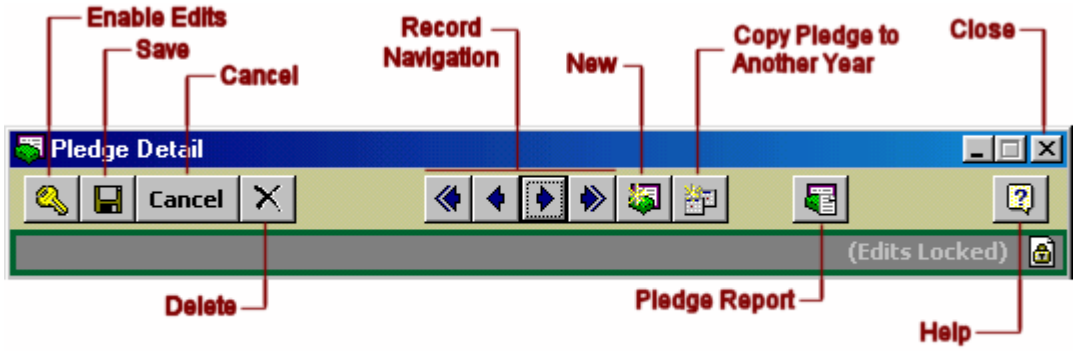
OR

- From the Pledges Explorer, right-click on a Pledge record and choose "Open Pledge Detail" from the right-click pop-up menu.

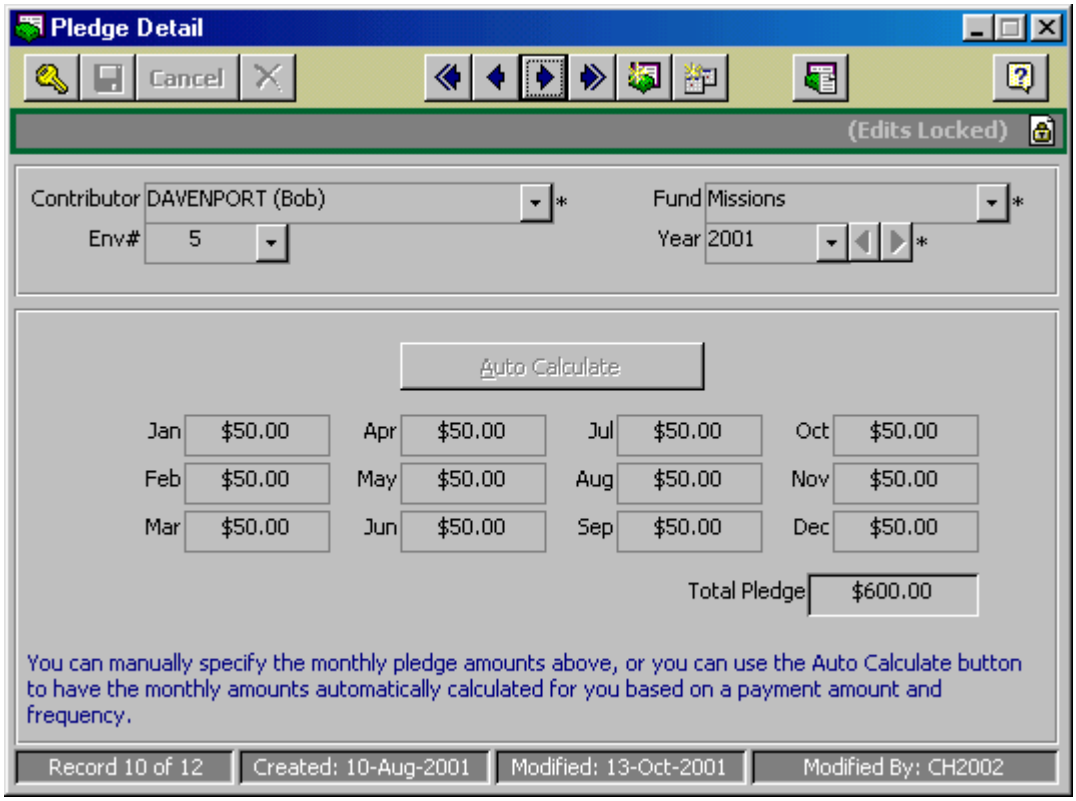
The Pledge Detail Form is used to manage Pledge records. This form will enable you to:

- Add new Pledge records
- Edit/Update Pledge records
- Copy Pledge records from one year to another
- View Pledge details
- Delete Pledge records

The Pledge Detail Form's toolbar is shown below:



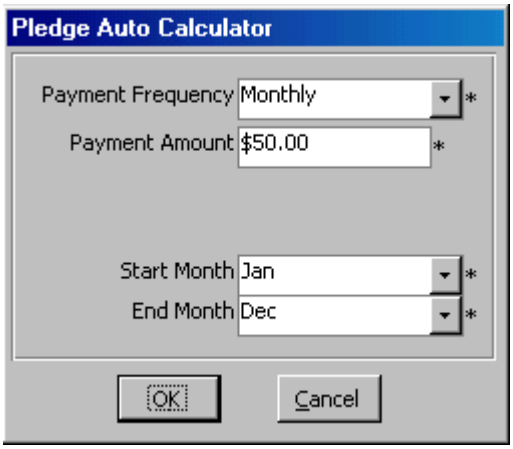
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When entering Pledge records, the first step is to identify the contributor. You can utilize the "Contributor" pull-down control to select the Contributor by name or the "Env#" pull-down control to select the Contributor by their envelope number. The Contributor and Env# pull-down controls only include those Households, Individuals, and Contacts who have been specified as "Contributor-Types" (through the Household Detail Form, Individual Detail Form, and Contact Detail Form).

In addition to identifying the contributor, every Pledge record must have an associated contribution Fund and associated calendar Year.

You can manually enter in pledge values for each month, or you can use the Auto Calculate button to have CH2002 calculate a monthly value based on your input. Clicking this Auto Calculate button, will display the following screen:



This form allows you to enter in Pledge amount in various formats and will convert this information to monthly values to be transferred to the Pledge Detail Form.

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TIP: Multi-year pledges require multiple Pledge records - one Pledge record for each calendar year included in the pledge. The Pledge Detail Form's "Copy Pledge To Another Year" button is useful in creating multiple Pledge records in this scenario.

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8.4 Pledge Procedures

8.4.1 Pledge Procedures

(Chapter 8 - Pledges)

Viewing Pledge Records
Editing A Pledge Record
Adding A New Pledge Record
Copying A Pledge From One Year to Another
Deleting A Pledge Record

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8.4.2 Viewing Pledge Records

(Chapter 8 - Pledges)

1. Activate the Pledges Explorer by selecting "Explorer Views | Pledges Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select a desired item from the Display pull-down list located in the Explorer's menubar. (The value selected here will affect what is displayed in the Explorer's left-hand ListView control).
3. Select an item from the left-hand ListView control by clicking it. Once an item has been selected here, the right-hand ListView control will display all related Pledge records for the selected item.

To open a Pledge record for editing, double-click the Pledge record from the right-hand ListView control.

Example: *View all recorded Pledge records for John Smith for all years.*

- Open the Pledges Explorer
- Select "By Contributor" from the Display pull-down list in the Explorer's toolbar section
- Click the "All Years" checkbox in the Explorer's toolbar section
- Click on "Smith, John" from the left-hand ListView control

The right-hand ListView control will now display the all Pledge records associated with John Smith.

TIP: You can specify the default settings for the "Display" pull-down list from thePledges tab of the General Program Preferences screen.

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8.4.3 Editing A Pledge Record

(Chapter 8 - Pledges)

1. Activate the Pledges Explorer by selecting "Explorer Views | Pledges Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select desired value from the "Display" pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Locate the desired Pledge record to be edited double-click it. This will open the Pledge record in the Pledge Detail Form.
5. Click the "Unlock" button  at the top-left hand corner of the Pledge Detail Form to enable editing of the form.
6. Make the desired changes to the Pledge record.
7. When editing is complete, click the "Save" button  to save the changes you've made.

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8.4.4 Adding A New Pledge Record

(Chapter 8 - Pledges)

You can begin the creation of a new Pledge record in 3 ways:

1. **Pledges Explorer**: From the Pledges Explorer's toolbar, select the New Pledge button  . This will open the Pledge Detail Form and display a new (blank) Pledge record - ready for your data entry. When you are finished entering the Pledge data, click the Pledge Detail Form's Save button  to save the new record.
2. **Pledge Detail Form**: From the Pledge Detail Form's toolbar, select the New Pledge button  . This will navigate the Form to a new (blank) Pledge record - ready for your data entry. When you are finished entering the Pledge data, click the Pledge Detail Form's Save button  to save the new record.
3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Pledge". This will open the Pledge Detail Form and display a new (blank) Pledge record - ready for your data entry. When you are finished entering the Pledge data, click the Pledge Detail Form's Save button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

TIP: You can manually enter in values to any of the month pledge fields on the Pledge Detail Form. However, in most cases it's quickest to use the auto-calculator to generate these monthly values for you. The auto-calculator allows you to express the Pledge amounts in any of several formats. For example, suppose you receive a Pledge from John Smith for $50.00 per week towards the "Missions" fund. Rather than trying to figure the monthly value for this to enter into the Pledge Detail Form, just use the auto-calculator button and you can enter in the frequency ("Weekly") and amount ($50.00). The monthly values will automatically be generated and placed onto the Pledge Detail Form.

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8.4.5 Copying A Pledge From One Year to Another

(Chapter 8 - Pledges)

1. Activate the Pledges Explorer by selecting "Explorer Views | Pledges Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select desired value from the Display pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Locate the desired Pledge record to be copied double-click it. This will open the Pledge record in the Pledge Detail Form.
5. Click the "Copy Current Pledge to Another Year" button  from the Pledge Detail form's toolbar. This will open the Pledge Copy dialog box.
6. From the Pledge Copy dialog box, enter in the year you wish to copy the Pledge to and then click the OK button. This will copy the current Pledge record to a new Pledge record with the specified year. All other aspects of the Pledge record (i.e. contributor, fund, amount, etc.) remain identical to the existing Pledge.

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8.4.6 Deleting A Pledge Record

(Chapter 8 - Pledges)

1. Activate the Pledges Explorer by selecting "Explorer Views | Pledges Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Select desired value from the "Display" pull-down list located in the Explorer's menubar.
3. Select the appropriate value from the Year pull-down list located in the Explorer's menubar.
4. Locate the desired Pledge record to be deleted and double-click it. This will open the Pledge record in the Pledge Detail Form.
5. Click the "Unlock" button  at the top-left hand corner of the Pledge Detail Form to enable editing of the form.
6. Click the Delete button  to delete the Pledge record.
7. Choose Yes to the deletion confirmation prompt.

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Chapter 9

9 Chapter 9 - Meetings & Attendance

9.1 Chapter 9 - Meetings & Attendance

Chapter 9 Sections:

- Meetings Explorer
- Meeting Detail Form
- Meeting & Attendance Procedures

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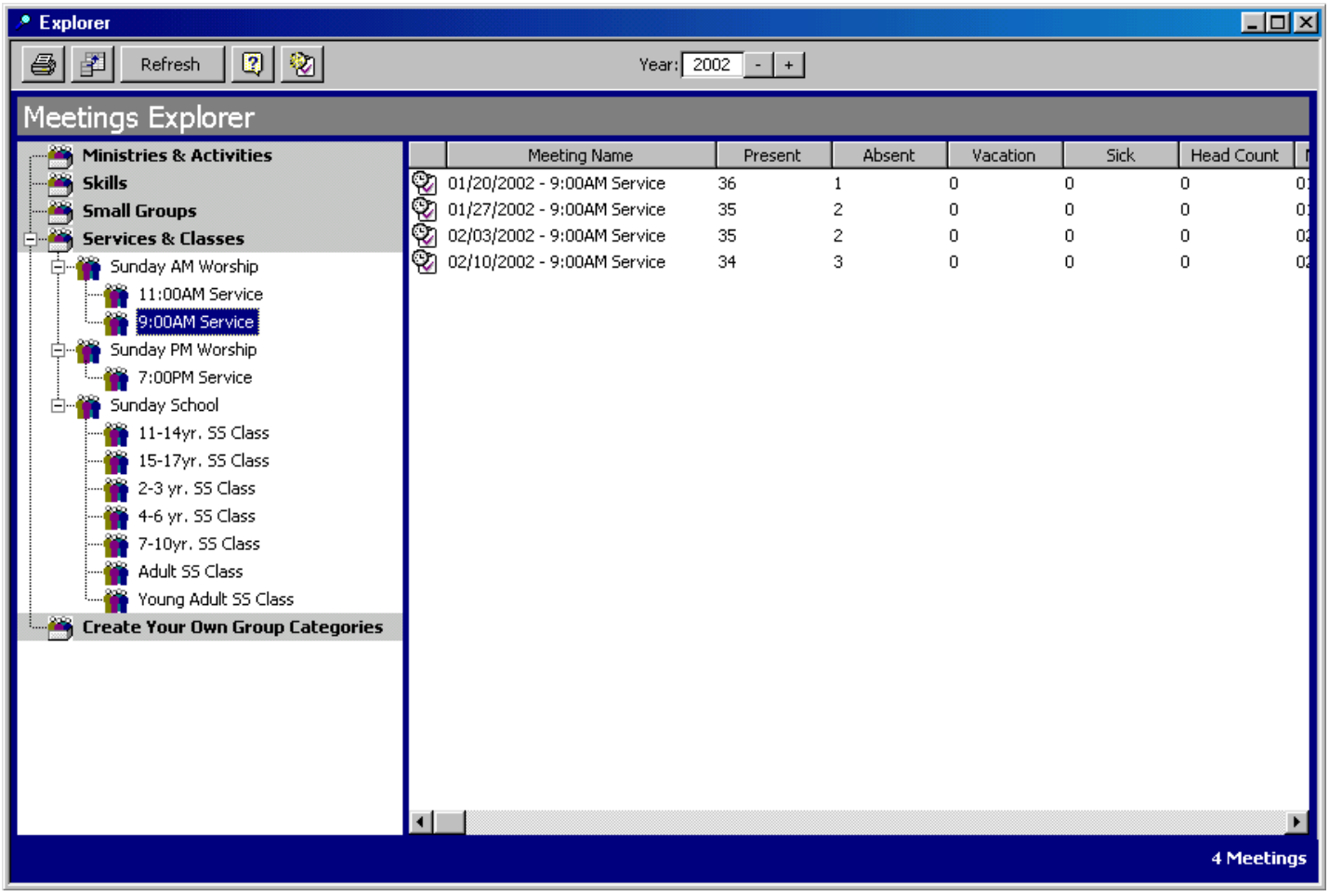
9.2 Meetings Explorer

(Chapter 9 - Meetings & Attendance)

To reach the Meetings Explorer, select "Explorer Views | Meetings Explorer" from the program's main menubar or from the Navigation Menu.

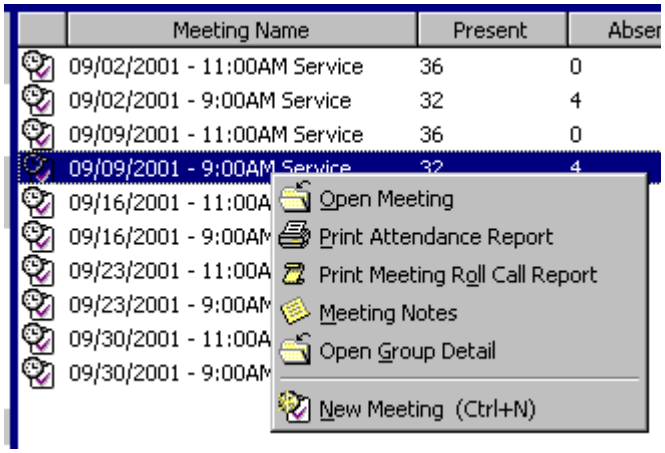
The Meetings Explorer provides you a powerful visual representation of the Group Meeting records contained within your database. The Meetings Explorer view is made up of 2 parts: the filter TreeView control on the left and the ListView data control on the right as shown below. The TreeView control displays Group names in a hierarchy structure. Only Groups who have been enabled for attendance tracking will be shown. The ListView data control displays Meeting records of the selected Group (the Group selected in the TreeView control). Meeting Name and attendance statistics are shown in the ListView control for each Meeting record.

Normally the Meetings Explorer will default to only displaying Meeting records for the current calendar year. However, the "Year" control found in the Explorer's toolbar section can be used to alter the displayed year.



Right-clicking a Meeting record from the ListView control will display a useful menu as shown below:

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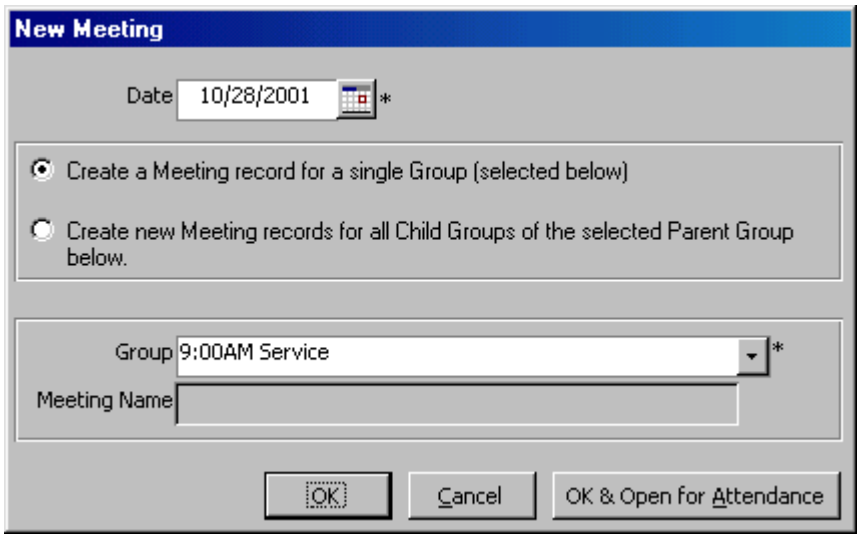


TIP: As with all of the CH2002 Explorer Views, the Meetings Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Meeting Detail Form .

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9.3 New Meeting Form

(Chapter 9 - Meetings & Attendance)


New Meeting
Date 10/28/2001 *
Create a Meeting record for a single Group (selected below)
Create new Meeting records for all Child Groups of the selected Parent Group below.
Group 9:00AM Service *
Meeting Name
OK
Cancel
OK & Open for Attendance

The New Meeting form facilitates the creation of new Meeting records. This form can be reached by any of the following methods:

- "File" Menu: Select "File | New | Meeting" from the CH2002 top main menubar.
- Meetings Explorer: Click the New Meeting button in the Explorer's toolbar section.
- Meeting Detail Form: Click the New Meeting button in the form's toolbar section.

The New Meeting form will enable you to either:

- Create 1 Meeting record for a specified Group
- Create a Meeting record for all Child-level Groups of a selected Parent-level Group

Clicking the "OK" button creates the Meeting record(s) and associated Attendance records for the Meeting(s). Clicking the "OK & Open for Attendance" button performs these functions as well but also opens the Meeting in the Meeting Detail Form - ready for your attendance data entry.

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9.4 Meeting Detail Form

(Chapter 9 - Meetings & Attendance)

To reach the Meeting Detail Form:

- Select "Detail Views | Meeting Detail Form" from the program's main menubar or from the Navigation Menu.

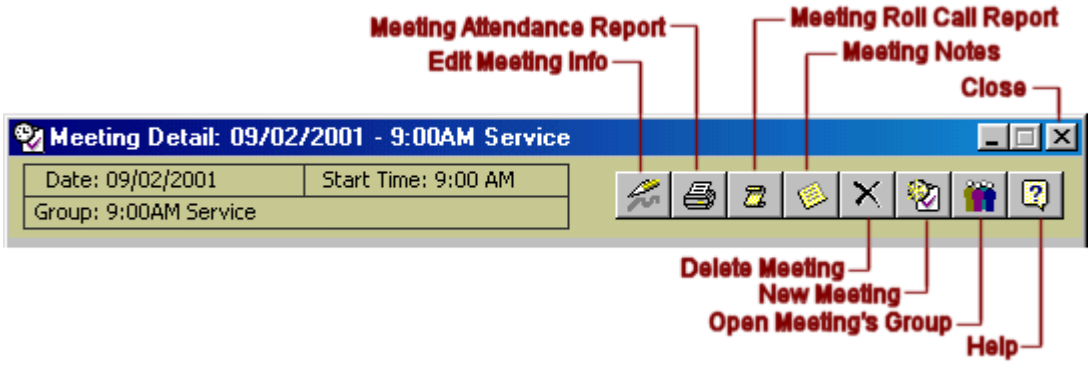
OR

- From the Meetings Explorer, right-click on a Meeting record and choose "Open Meeting" from the right-click pop-up menu.

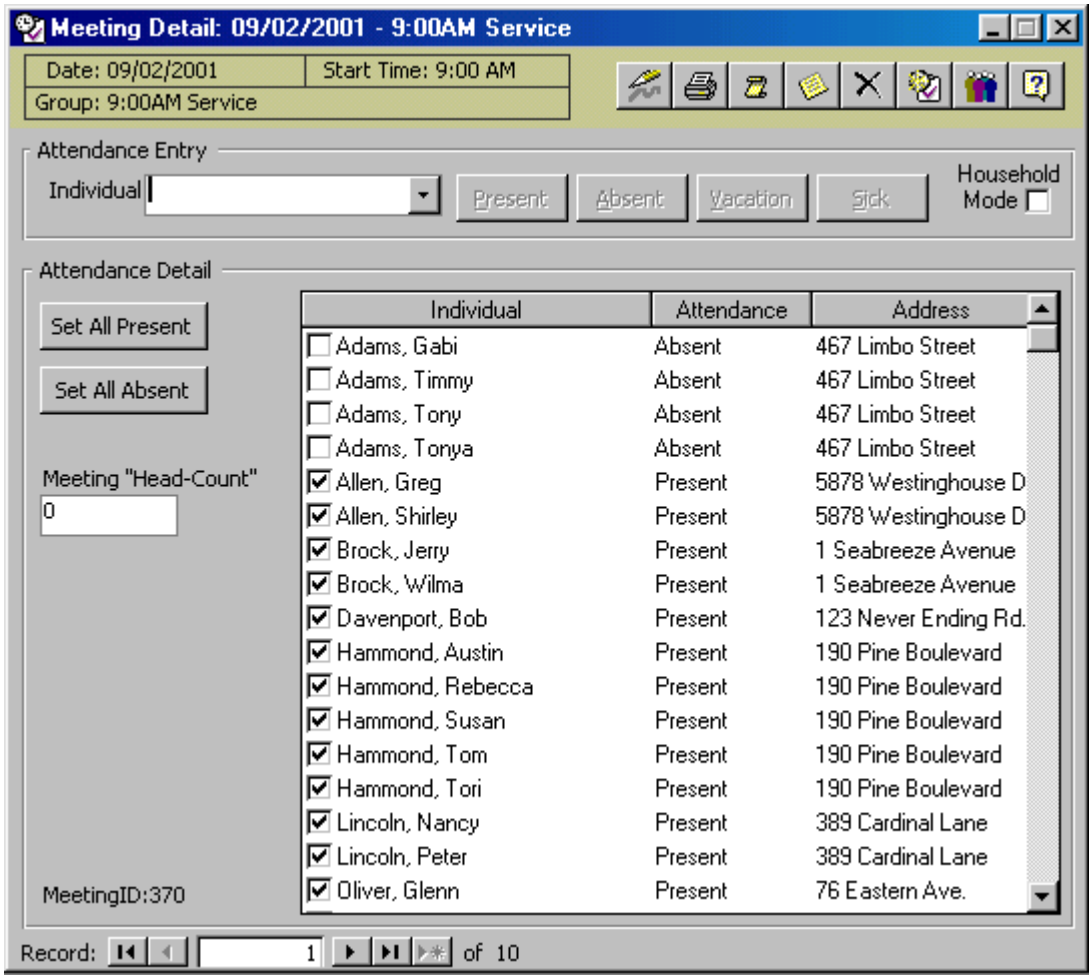
The Meeting Detail Form is used to manage Meeting and Attendance records. This form will enable you to:

- Add new Meeting records
- Edit/Update Meeting records
- View Meeting details
- Delete Meeting records
- Assign/View Meeting Attendance records

The Meeting Detail Form's toolbar is shown below:



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***"Attendance Entry"* Section:**
This section provides a streamlined method of setting attendance values for the current Meeting record. The Individual pull-down list includes all Individual's who are members of the Meeting's Group. Once an Individual name has been selected in this pull-down list, the attendance buttons (Present, Absent, Vacation, and Sick) are enabled allowing the user to designate the selected Individual's attendance value.

The "Household Mode" checkbox causes the Meeting Detail Form to operate in a Household attendance mode. When in Household Mode, the pull-down list displays Households whose Individuals are members of the Meeting's Group. Selecting a Household name from the pull-down list and choosing from one of the attendance value buttons will set all of the selected Household Individual's attendance values to this value. For example, if the Smith Household is selected and then the "Present" button is activated, all Individuals in the ListView control from the Smith Household will have their attendance values set to "Present".

***"Attendance Detail"* Section:**
This section contains a ListView control which displays all of the Attendance records associated with the current Meeting record. You can set attendance values directly from the ListView control by right-clicking on an Individual in the list and then selecting the appropriate value from the pop-up menu. Alternately, pressing the Spacebar on your keyboard will toggle through the Attendance values for the selected Individual in the ListView control.

TIP: You can use the Attendance Preferences screen to determine the default value of the Household Mode checkbox.

TIP: Meeting Attendance records are automatically created at the time the Meeting record is created. When a Meeting

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record is created, an associated Attendance record will be created for each Individual who is currently a member of the Meeting's associated Group. If an individual was given membership to the Group **after** the Meeting record was created, then they will not have an associated Attendance record (since the Attendance records were created with the Meeting record) and the individual will **not** appear in the ListView control. The pull-down list in the "Attendance Entry" section at all times includes all individuals who are currently members of the associated Group. If an individual was **not** a Group member when the Meeting record was created - but they've since been given membership to the Group, they **will** be included in the pull-down list. By selecting such an Individual from the pull-down list and setting their attendance through one of the 4 attendance buttons, an Attendance record will automatically be created and they will be added to the ListView control.

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9.5 Meeting & Attendance Procedures

9.5.1 Meeting & Attendance Procedures

(Chapter 9 - Meetings & Attendance)

Viewing Meeting & Attendance Records
Editing A Meeting Record
Adding A New Meeting Record
Deleting A Meeting Record
Assigning Attendance For A Meeting Record

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9.5.2 Viewing Meeting & Attendance Records

(Chapter 9 - Meetings & Attendance)

1. Activate the Meetings Explorer by selecting "Explorer Views | Meetings Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Meetings Explorer to select the desired Group.
3. The ListView control (on the right-hand side of the Explorer) displays Meeting records associated with the selected Group in the TreeView control.
4. To view details about a Meeting record (including detailed attendance), double-click the Meeting from the ListView control. Doing so will open the Meeting record in the Meeting Detail Form.

TIP: Only Groups who have been enabled for attendance tracking will be listed in the Meeting Explorer's TreeView control.

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9.5.3 Editing A Meeting Record

(Chapter 9 - Meetings & Attendance)

1. Open the desired Meeting record in the Meeting Detail Form by double-clicking it from the ListView control of the Meetings Explorer.
2. To edit basic details of the Meeting record, click the "Edit Batch Info" button  from the toolbar. This will open the Edit Meeting dialog box. Here you can edit the Date and associated Group for the Meeting record. When done editing, click the OK button to return to the Meeting Detail Form.

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9.5.4 Adding A New Meeting Record

(Chapter 9 - Meetings & Attendance)

You can begin the creation of a new Meeting in 3 ways:

1. **Meetings Explorer**: From the Meetings Explorer's toolbar, select the New Meeting button  . This will open the New Meeting dialog box. Here you can enter in the basic information about the Meeting record (Date, associated Group, etc.).
2. **Meeting Detail Form**: From the Meeting Detail Form's toolbar, select the New Meeting button  . This will open the New Meeting dialog box. Here you can enter in the basic information about the Meeting record (Date, associated Group, etc.).
3. **"File" Menu**: From the CH2002 top main menubar, select "File | New | Meeting". This will open the New Meeting dialog box. Here you can enter in the basic information about the Meeting record (Date, associated Group, etc.).

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9.5.5 Deleting A Meeting Record

(Chapter 9 - Meetings & Attendance)

1. Open the desired Meeting record in the Meeting Detail Form by double-clicking it from the ListView control of the Meetings Explorer.
2. To delete the Meeting record, click the Delete Meeting button  at the top of the form.
3. Select Yes at the deletion confirmation prompt.

TIP: Deleting a Meeting record will also delete all Attendance records associated with the Meeting record.

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9.5.6 Assigning Attendance For A Meeting Record

(Chapter 9 - Meetings & Attendance)

1. Open the desired Meeting record in the Meeting Detail Form by double-clicking it from the ListView control of the Meetings Explorer.
2. The ListView control of the Meeting Detail Form displays the Attendance records associated with the current Meeting record. Attendance values can be set either using the ListView control in the "Attendance Detail" section or by using the pull-down list and attendance buttons located in the "Attendance Entry" section of the Meeting Detail Form.

   Using the ListView control:
   - The first step is to select an Attendance record by clicking on the desired record.
   - Once a record has been selected from the ListView control, you can either use your keyboard's Spacebar to toggle through the attendance values or right-click the Attendance record to display a pop-up menu for available attendance values.

   Using the "Attendance Entry" section:
   - Use the pull-down list to select an Individual
   - Once an Individual has been chosen from the pull-down list, use the "Present", "Absent", "Vacation", and "Sick" buttons to set the desired attendance value.

The Meeting Detail Form has the option of operating in "Household Mode". The Household Mode is active when the Meeting Detail Form's "Household Mode" checkbox is checked. When in Household Mode, the pull-down list in the "Attendance Entry" section is changed from a listing of Individuals to a listing of Households. The buttons in the "Attendance Entry" section will set attendance values for all Household member Individuals of the selected Household who have attendance records in the ListView control.

TIP: For fastest data entry, use your keyboard's Tab key to navigate between the data fields and buttons in the "Attendance Entry" section. To activate a highlighted button, press the Enter key. To open (expand) a pull-down list from the keyboard, press the Alt key and Down Arrow key together when the pull-down list is highlighted (is the active control). Use the arrow keys to move between items in the pull-down list's list. Use the Enter key to select the highlighted value from a pull-down list.

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Chapter 10

10 Chapter 10 - Visitations

10.1 Chapter 10 - Visitations

Chapter 10 Sections:

- Visitations Explorer
- Visitation Detail Form
- Visitation Procedures

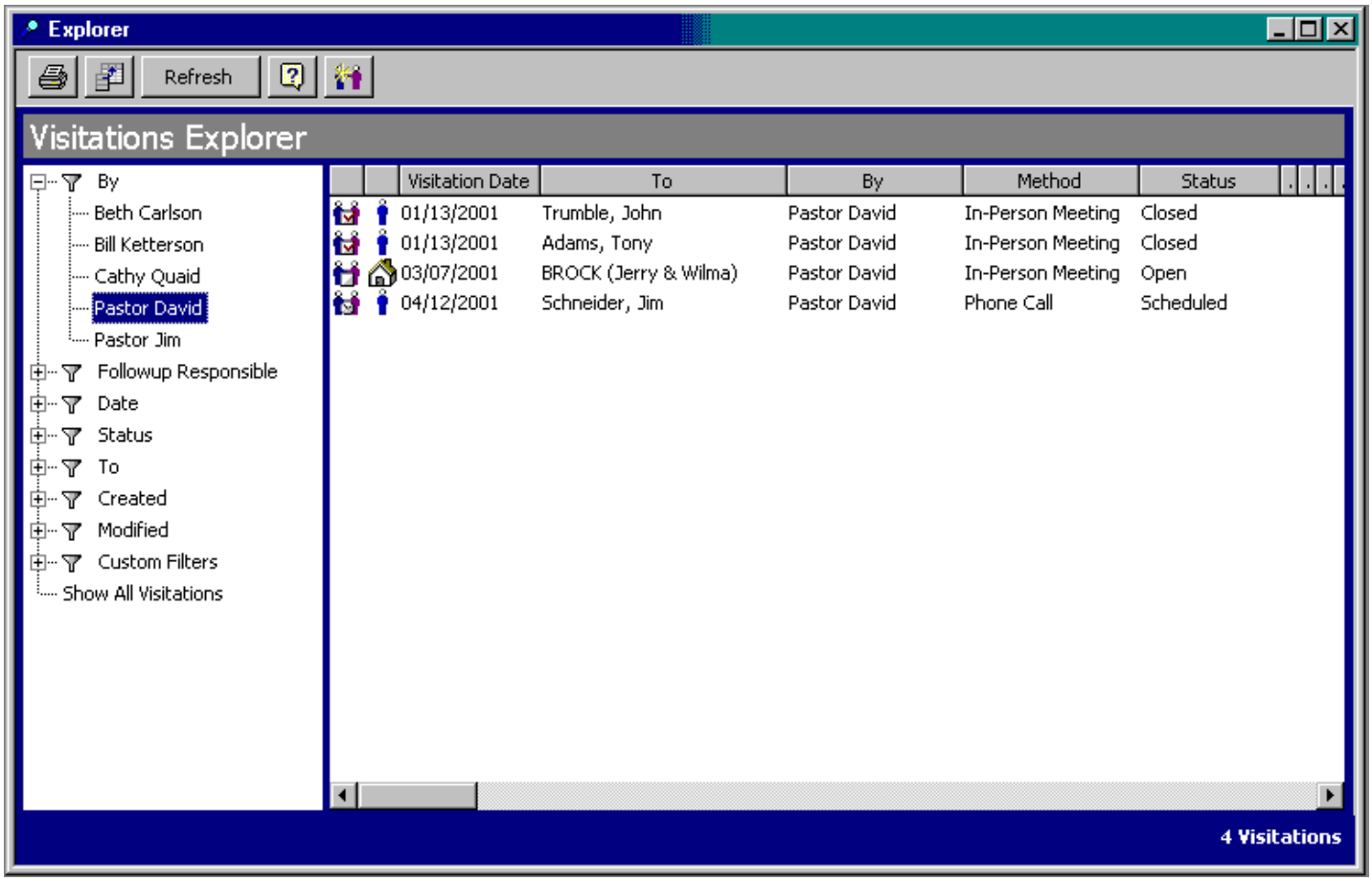
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10.2 Visitations Explorer

(Chapter 10 - Visitations)

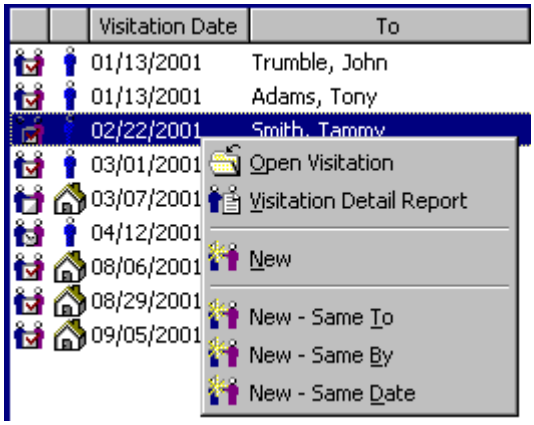
To reach the Visitations Explorer, select "Explorer Views | Visitations Explorer" from the program's main menubar or from the Navigation Menu.

The Visitations Explorer provides you a powerful visual representation of the Visitation records contained within your database. The Visitations Explorer view is made up of 2 parts: the filter TreeView control on the left and the ListView data control on the right as shown below:



You can use the TreeView filter to filter exactly which Visitation records are displayed in the ListView Data display. The image above shows how the display can be filtered to include only Visitations by Pastor David (as an example). Right-clicking a Visitation record from the ListView Data control will display a useful pop-up menu as shown below:

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TIP: Double-clicking a Visitation record in the ListView control will open the Visitation record in theVisitation Detail Form (which is equivalent to the menu item "Open Visitation" from the right-click pop-up menu).

TIP: As with all of the CH2002 Explorer Views, the Visitations Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Visitation Detail Form .

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10.3 Visitation Detail Form

10.3.1 Visitation Detail Form

(Chapter 10 - Visitations)

To reach the Visitation Detail Form:

- Select "Detail Views | Visitation Detail Form" from the program's main menubar or from the Navigation Menu.

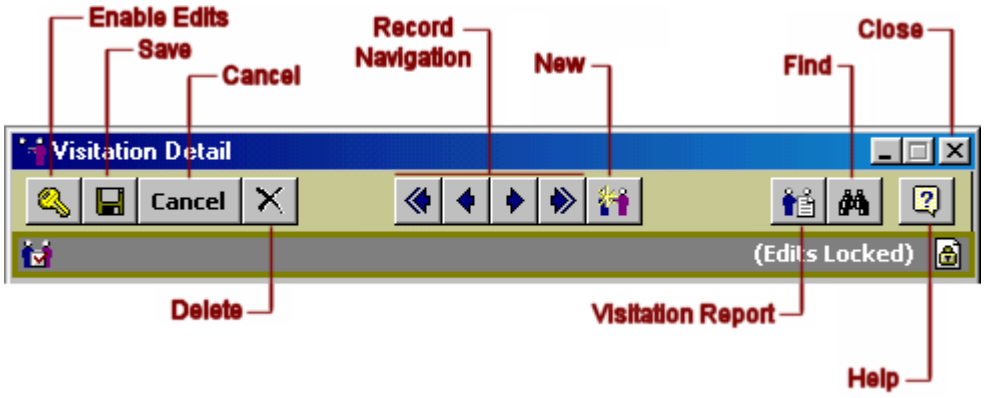
OR

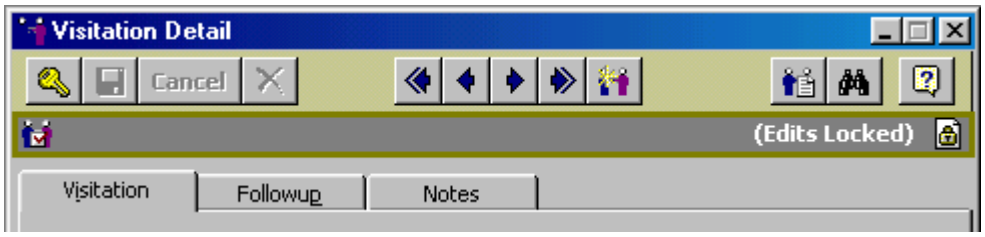
- From the Visitations Explorer, right-click on a Visitation record and choose "Open Visitation" from the right-click pop-up menu.

The Visitation Detail Form is used to manage Visitation records. This form will enable you to:

- Add new Visitation records
- Edit/Update Visitation records
- View Visitation details
- Delete Visitation records

The Visitation Detail Form's toolbar is shown below:



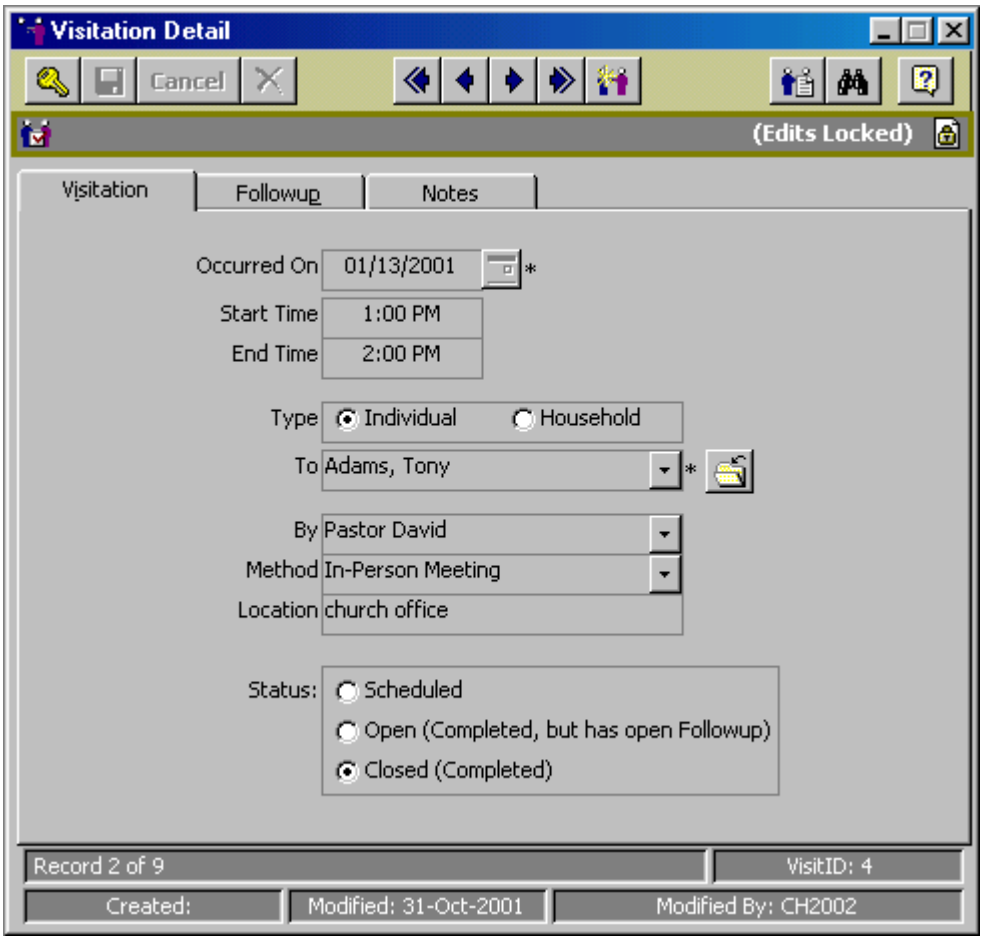


The Visitation Detail Form is divided into the following "tabs" (sections) as shown above:
"Visitation" Tab, "Followup" Tab, "Notes" Tab

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10.3.2 Visitation Detail Form - "Visitation" Tab

(Chapter 10 - Visitations)



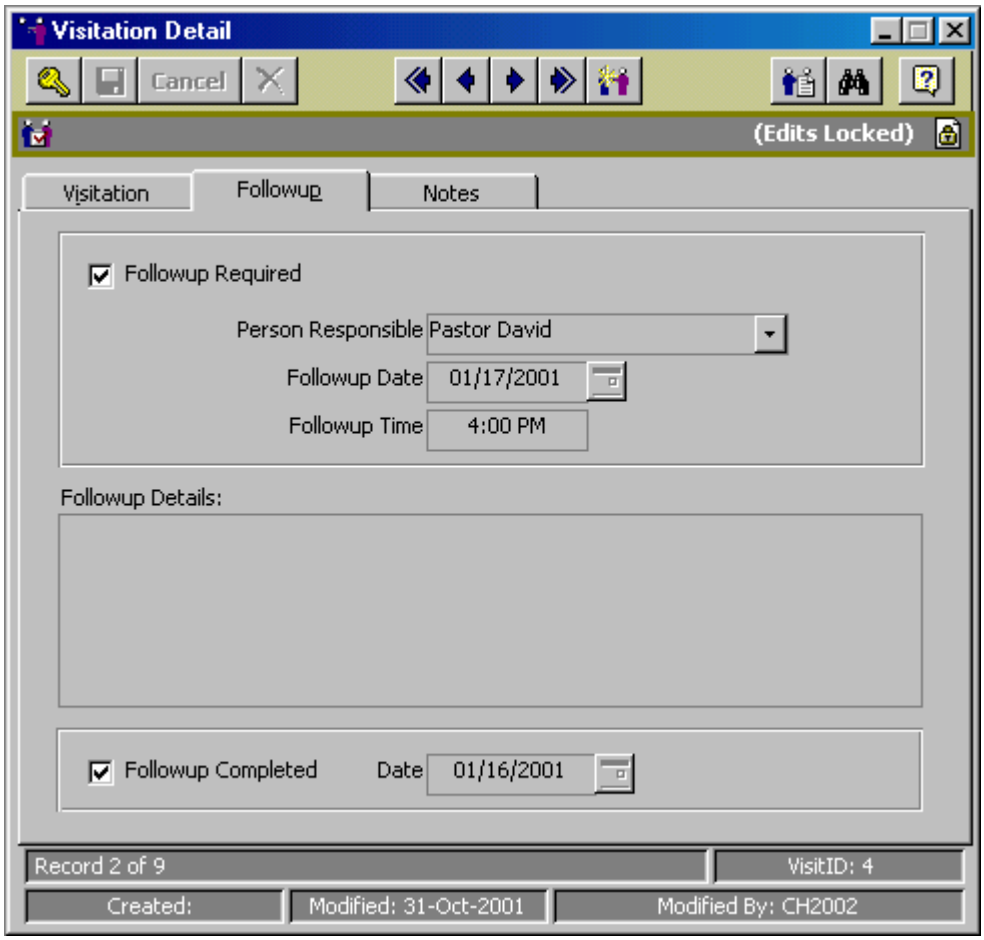
This tab is used to record general information about the Visitation including Date, time, person being visited, person performing the visitation, visitation location and method, and status.

TIP: Only fields marked with an asterisk ("*") are required fields.

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10.3.3 Visitation Detail Form - "Followup" Tab

(Chapter 10 - Visitations)



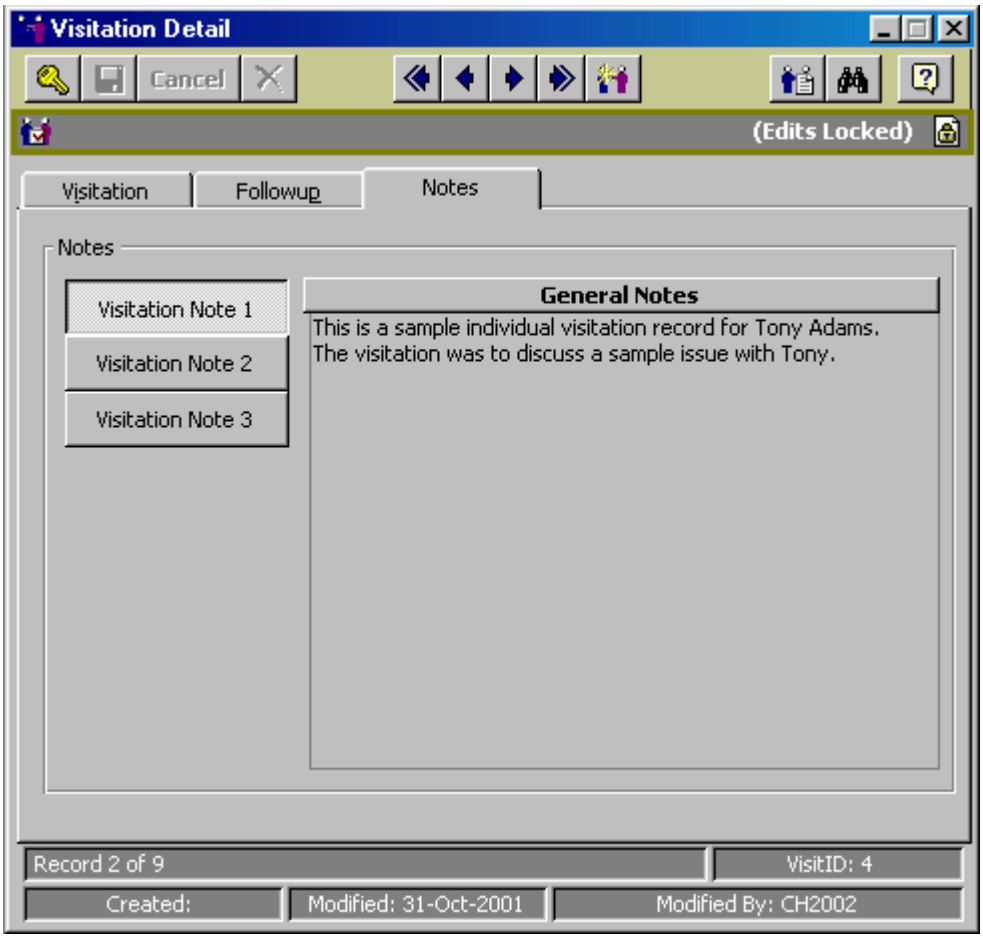
This tab is used to record information regarding Visitation followup requirements. If a visitation requires followup, the information here will ensure that this action is not forgotten.

TIP: None of the fields on this tab are required.

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10.3.4 Visitation Detail Form - "Notes" Tab

(Chapter 10 - Visitations)



The Notes tab of the Visitation Detail Form provides extensive storage capability to record detailed notes about the Visitation. There are 3 separate note fields provided. Each of these note fields has its own security level setting. Also, the note field labels are user-definable. For example, the screen-shot above shows the first note field as "Visitation Note 1", however this can be modified (in Visitations Setup) by the user to whatever might be appropriate for their usage.

The notes data is displayed in the right-hand section of the screen. The user can select which of the 3 note fields to display by selecting the desired note button on the left-hand side of the screen.

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10.4 Visitation Procedures

10.4.1 Visitation Procedures

(Chapter 10 - Visitations)

Viewing Visitation Records
Editing A Visitation Record
Adding A New Visitation Record
Deleting A Visitation Record

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10.4.2 Viewing Visitation Records

(Chapter 10 - Visitations)

1. Activate the Visitations Explorer by selecting "Explorer Views | Visitations Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the TreeView control on the left-hand side of the Visitations Explorer to display a desired filter set of Visitation records in the right-hand side ListView control.
3. The ListView control displays Visitation records with basic information (date, status, etc.). For more detailed information about a particular Visitation record or to edit the record, double-click the Visitation record. Doing so will open the Visitation record using the Visitation Detail Form.

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10.4.3 Editing A Visitation Record

(Chapter 10 - Visitations)

1. Open the desired Visitation record in the Visitation Detail Form by double-clicking it from the Visitations Explorer.
2. Click the "Unlock" button  at the top-left hand corner of the Visitation Detail Form to enable editing of the form.
3. Make the desired changes to the Visitation's record.
4. When editing is complete, click the "Save" button  to save the changes you've made.

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10.4.4 Adding A New Visitation Record

(Chapter 10 - Visitations)

1. You can begin the creation of a new Visitation record from several places in the CH2002 application.
   - **Visitations Explorer**: click the New Visitation button  in the Explorer's toolbar section.
   - **Visitation Detail Form**: click the "New Visitation" button  from the toolbar.
   - "File" Menu: select "File | New | Visitation" from the top main menubar to create a new Visitation record.

   Using these methods will open the Visitation Detail Form to a new (blank) Visitation record.
2. Enter data for the new Visitation record.
3. Click the "Save" button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

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10.4.5 Deleting A Visitation Record

(Chapter 10 - Visitations)

1. Open the desired Visitation record in the Visitation Detail Form by double-clicking it from the Visitations Explorer.
2. Click the "Unlock" button  at the top-left hand corner of the Visitation Detail Form to enable editing of the form.
3. Click the "Delete current visitation record" button  located in the toolbar section.
4. Select Yes at the deletion confirmation prompt.

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Chapter 11

11 Chapter 11 - Reminders

11.1 Chapter 11 - Reminders

Chapter 11 Sections:

- Reminders Explorer
- Reminder Detail Form
- Reminder Procedures

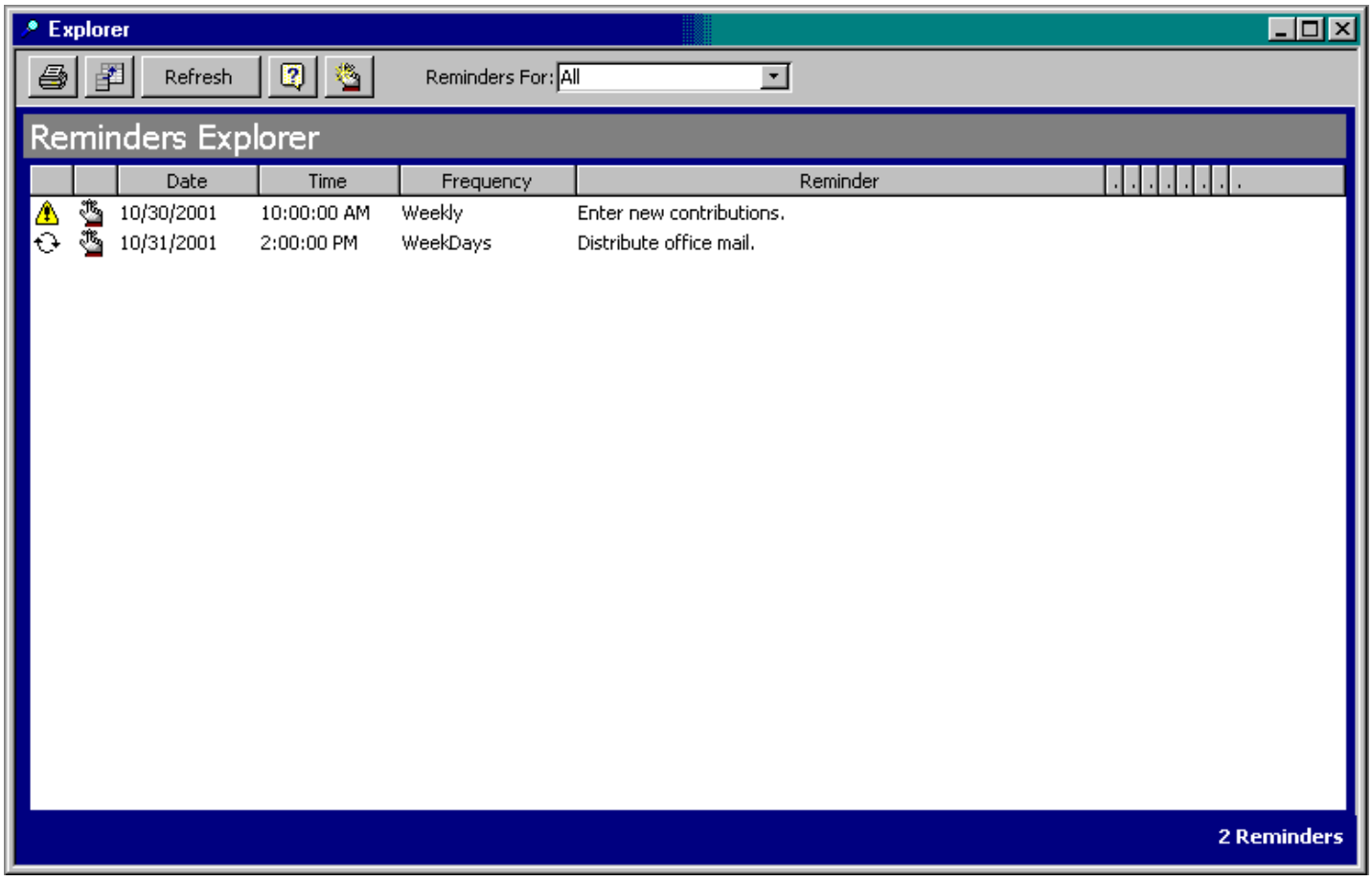
(c) Copyright 2001 Helpmate Technology Solutions

11.2 Reminders Explorer

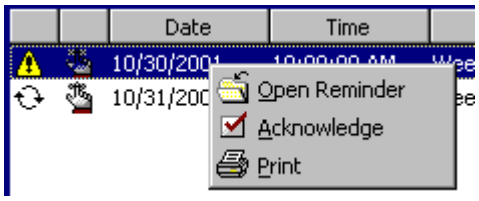
(Chapter 11 - Reminders)

To reach the Reminders Explorer, select "Explorer Views | Reminders Explorer" from the program's main menubar or from the Navigation Menu.

The Reminders Explorer provides you a powerful visual representation of the Reminder records contained within your database.



Right-clicking a Reminder record from the ListView control will display a useful menu as shown below:



TIP: Double-clicking a Reminder record in the ListView control will open the Reminder record in theReminder Detail Form (which is equivalent to the menu item "Open Reminder" from the right-click pop-up menu).

TIP: As with all of the CH2002 Explorer Views, the Reminders Explorer view is a "Read Only" view. This means that you can't edit the data displayed. Editing must be done from the Reminder Detail Form .

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11.3 Reminder Detail Form

(Chapter 11 - Reminders)

To reach the Reminder Detail Form:

- Select "Detail Views | Reminder Detail Form" from the program's main menubar or from the Navigation Menu.

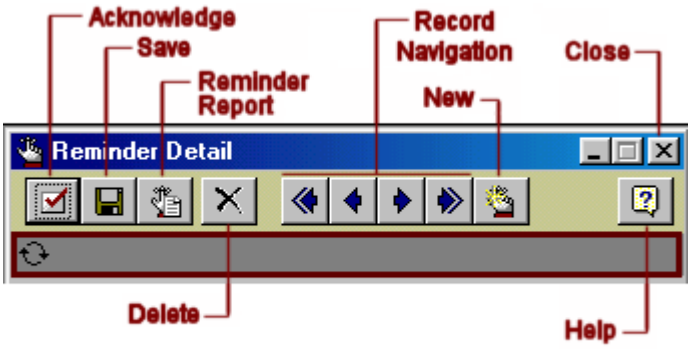
OR

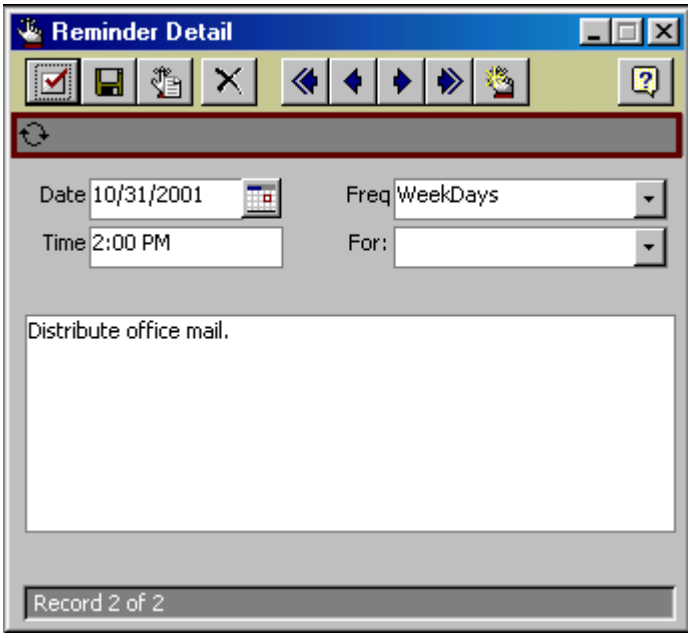
- From the Reminders Explorer, right-click on a Reminder record and choose "Open Reminder" from the right-click pop-up menu.

The Reminder Detail Form is used to manage Reminder records. This form will enable you to:

- Add new Reminder records
- Edit/Update Reminder records
- Acknowledge Reminders
- View Reminder details
- Delete Reminder records

The Reminder Detail Form's toolbar is shown below:





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TIP: Reminder records can either by one-time or recurring. A one-time Reminder when acknowledged will be deleted from the database. A recurring Reminder when acknowledged will be modified so that its date value is moved to the next occurring date (dependent on the Frequency value).

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11.4 Reminder Procedures

11.4.1 Reminder Procedures

(Chapter 11 - Reminders)

Viewing Reminder Records
Acknowledging A Reminder
Editing A Reminder Record
Adding A New Reminder Record
Deleting A Reminder Record

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11.4.2 Viewing Reminder Records

(Chapter 11 - Reminders)

1. Activate the Reminders Explorer by selecting "Explorer Views | Reminders Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the Reminders Explorer's "Reminder For" pull-down list to display the desired date range for the Explorer.
3. The ListView control displays Reminder records with basic (read-only) information. For more detailed information about a particular Reminder record or to edit the record, double-click the Reminder record. Doing so will open the Reminder record using the Reminder Detail Form.

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11.4.3 Acknowledging A Reminder

(Chapter 11 - Reminders)

1. Activate the Reminders Explorer by selecting "Explorer Views | Reminders Explorer" from the CH2002 Navigation Menu or top main menubar.
2. Use the Reminders Explorer's "Reminder For" pull-down list to display the desired date range for the Explorer.
3. To acknowledge a Reminder, right-click Reminder record in the ListView control and then select "Acknowledge" from the pop-up menu.

TIP: A one-time Reminder when acknowledged will be deleted from the database. A recurring Reminder when acknowledged will be modified so that its date value is moved to the next occurring date (dependent on the Frequency value).

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11.4.4 Editing A Reminder Record

(Chapter 11 - Reminders)

1. Open the desired Reminder record in the Reminder Detail Form by double-clicking it from the Reminders Explorer.
2. Make the desired changes to the Reminder's record.
3. When editing is complete, click the "Save" button  to save the changes you've made.

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11.4.5 Adding A New Reminder Record

(Chapter 11 - Reminders)

1. You can begin the creation of a new Reminder record from several places in the CH2002 application.
   - **Reminders Explorer**: click the New Reminder button  in the Explorer's toolbar section.
   - **Reminder Detail Form**: click the "New Reminder" button  from the toolbar.
   - "File" Menu: select "File | New | Reminder" from the top main menubar to create a new Reminder record.

   Using these methods will open the Reminder Detail Form to a new (blank) Reminder record.
2. Enter data for the new Reminder record.
3. Click the "Save" button  to save the new record.

TIP: Any data fields with an asterisk ("*") next to them are required fields and must be filled in before you can save the record.

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11.4.6 Deleting A Reminder Record

(Chapter 11 - Reminders)

1. Open the desired Reminder record in the Reminder Detail Form by double-clicking it from the Reminders Explorer.
2. Click the "Delete" button  from the toolbar section.

TIP: Acknowledging a one-time Reminder has the same affect as deleting a Reminder. A recurring Reminder when acknowledged will not be deleted but will instead be modified so that its date value is moved to the next occurring date (dependent on the Frequency value).

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Chapter 12

12 Chapter 12 - Special Dates

12.1 Chapter 12 - Special Dates

Chapter 12 Sections:
Special Dates Explorer

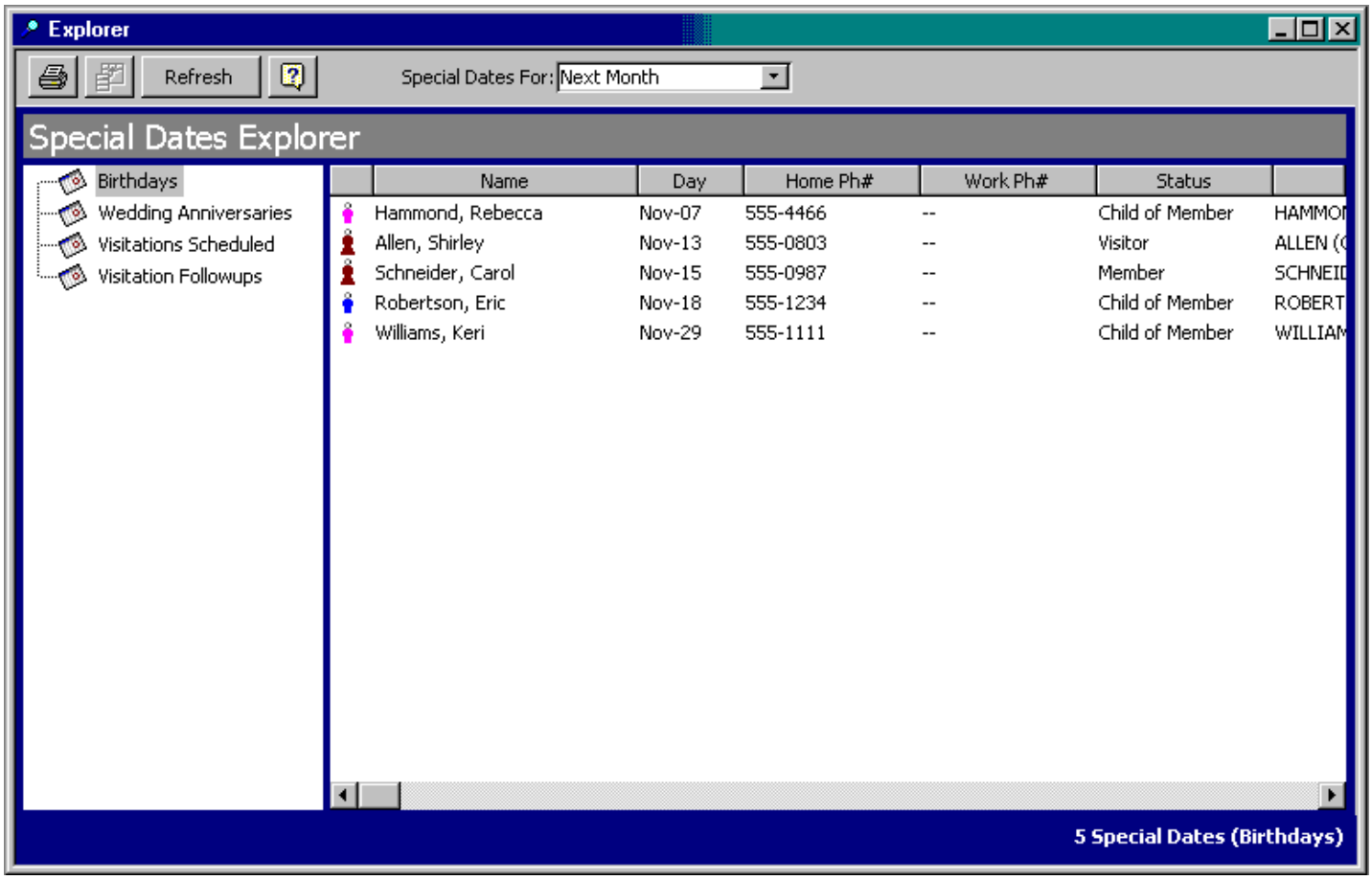
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12.2 Special Dates Explorer

(Chapter 12 - Special Dates)

To reach the Special Dates Explorer, select "Explorer Views | Special Dates Explorer" from the program's main menubar or from the Navigation Menu.

The Special Dates Explorer provides you a convenient view of important dates (such as Birthdays and Wedding Anniversaries) related to your CH2002 records.



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Chapter 13

13 Chapter 13 - Reporting & Other Output Options

13.1 Chapter 13 - Reporting & Other Output Options

Church Helpmate 2002 wouldn't be very useful if it was limited to only data entry and on-screen displays. However, CH2002 has an impressive arsenal of reporting and other output tools to help you share your CH2002 data with others through informative and insightful reports, statements, charts, form letters, exports, etc. CH2002 includes nearly 40 user-friendly "report configurators" to assist you - plus a Custom Report Generator as well !

Chapter 13 Sections:

- Reports Explorer
- Reports & Statements
- Mailing Labels
- Form Letters
- MS Word Mail Merge
- Exports
- Household-based Outputs
- Individual-based Outputs
- Contact-based Outputs
- Group-based Outputs
- Contribution-based Outputs
- Pledge-based Outputs
- Meeting & Attendance-based Outputs
- Visitation-based Outputs
- Reminder-based Outputs

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13.2 Reports Explorer

(Chapter 13 - Reporting & Other Output Options)

The "Reports Explorer" enables you to browse through the nearly 40 "report configurators" provided by the CH2002 program.

The Reports Explorer is activated by selecting any of the reporting menu options available under the "Reports" menu of the Navigation Menu or the top main menubar. The following is a screen-shot of the Reports Explorer displaying Household-based report configurators.

The left-hand section of the Reports Explorer contains a ListView control displaying all of the report configurators available for the specified type of CH2002 records. For example, the screen-shot below shows the Reports Explorer after the user select "Reports | Household Reports" from the Navigation Menu. The right-hand section of the Reports Explorer displays properties of the selected report configurator. For example, the screen-shot below shows details about the selected report configurator ("Household Directory Configurator").



To activate (open) any of the report configurators listed in the Reports Explorer's ListView control, simply double-click on the name of the desired report configurator.

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13.3 Reports & Statements

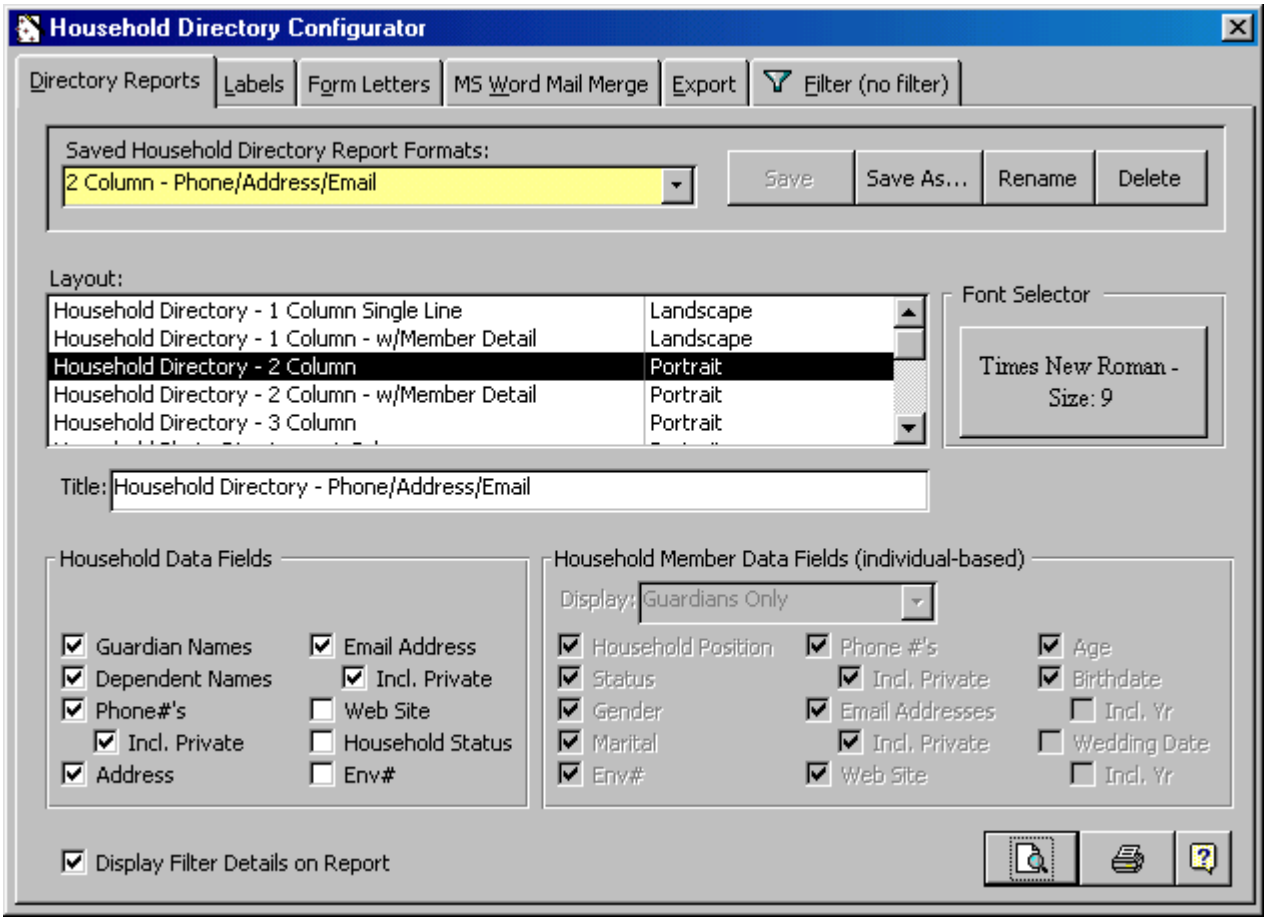
(Chapter 13 - Reporting & Other Output Options)



Reports are the most common output option. Reports can be used to effectively communicate the CH2002 data to the staff of your organization or to your congregation as well. Reports can either be previewed on the screen (know as "print preview") or sent to your printer (for a "hard-copy").

All of the CH2002 report configurators have the ability to generate at least 1 of the 4 report types:
- General Reports
- Directory Reports
- Statement Reports
- Charts & Graphs

The Reporting options and capabilities of each of the report configurators varies. Some report configurators, such as the Household Directory Configurator (shown below), allow you to save and reuse your report settings.



On the report configurators with this capability, the top section of the reports tab includes a pull-down control where you can retrieve and use previously saved report formats. These saved report formats automatically configure the controls in the middle and lower section. These controls set such parameters as report layout, title, desired data fields, font settings, etc. You can manually adjust these controls and, if desired, save these settings using the "Save" or "Save As" buttons. The "Save" button will take a snap-shot of the current report settings and save it to the currently displayed Report Format (in the

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top yellow pull-down control). Using the "Save As" button allows you to create a new saved format with your specified name - leaving the currently displayed Report Format unchanged. The "Rename" button allows you to rename the currently selected Report Format, while the "Delete" button will delete the currently selected Report Format.

In the lower right-hand section, both a Print Preview and a Print button are provided. The Print Preview button will allow you to preview the report on-screen before sending to the printer, while the Print button allows you to send the report directly to the printer.

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13.4 Mailing Labels

(Chapter 13 - Reporting & Other Output Options)

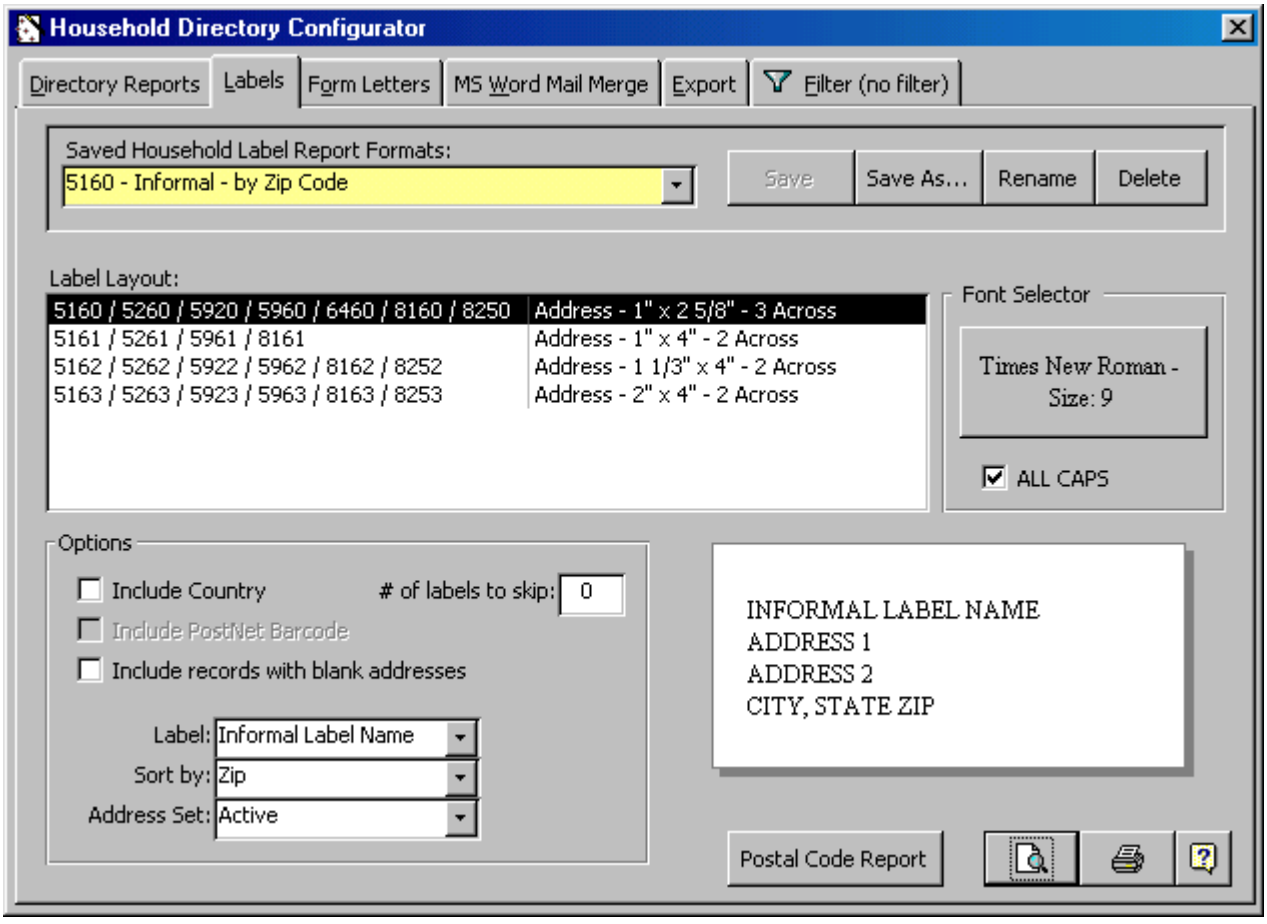


CH2002 provides the ability to easily generate mailing labels for your CH2002 Household, Individual, and Contact records. Options include flexible sorting options, customizable font settings, US PostNet barcode support, Formal and Informal label name selection, and more.

The following CH2002 report configurators have the ability to generate Mailing Labels:

- Household Directory Configurator
- Individuals Directory Configurator
- Individuals Milestone Report Configurator
- Contacts Directory Configurator
- Group Membership Directory Configurator
- Contribution Statement Configurator
- Pledge Statement Configurator
- Meeting Absentee Report Configurator
- X-Time Attendance Report Configurator
- Visitations Report Configurator

The report configurators listed above include a "Labels" tab to facilitate label generation. The controls and functionality found on the "Labels" tab are very similar regardless of which report configurator is being used. A screen-shot of the Household Directory Configurator's "Labels" tab is shown below:


Household Directory Configurator
Directory Reports
Labels
Form Letters
MS Word Mail Merge
Export
Filter (no filter)
Saved Household Label Report Formats:
5160 - Informal - by Zip Code
Save
Save As...
Rename
Delete
Label Layout:
5160 / 5260 / 5920 / 5960 / 6460 / 8160 / 8250
Address - 1" x 2 5/8" - 3 Across
5161 / 5261 / 5961 / 8161
Address - 1" x 4" - 2 Across
5162 / 5262 / 5922 / 5962 / 8162 / 8252
Address - 1 1/3" x 4" - 2 Across
5163 / 5263 / 5923 / 5963 / 8163 / 8253
Address - 2" x 4" - 2 Across
Font Selector
Times New Roman - Size: 9
ALL CAPS
Options
Include Country
of labels to skip: 0
Include PostNet Barcode
Include records with blank addresses
Label: Informal Label Name
Sort by: Zip
Address Set: Active
INFORMAL LABEL NAME
ADDRESS 1
ADDRESS 2
CITY, STATE ZIP
Postal Code Report

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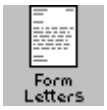
The top section of the "Labels" tab includes a pull-down control where you can retrieve and use previously saved label report formats. These saved label formats automatically configure the controls in the middle and lower section of the "Labels" tab. These controls set such parameters as label size, sorting options, font settings, etc. You can manually adjust these controls and, if desired, save these settings using the "Save" or "Save As" buttons. The "Save" button will take a snap-shot of the current label settings and save it to the currently displayed Label Report Format (in the top yellow pull-down control). Using the "Save As" button allows you to create a new saved format with your specified name - leaving the currently displayed Label Report Format unchanged. The "Rename" button allows you to rename the currently selected Label Report Format, while the "Delete" button will delete the currently selected Label Report Format.

In the lower right-hand section, both a Print Preview and a Print button are provided. The Print Preview button will allow you to preview the label report on-screen before sending to the printer, while the Print button allows you to send the label report directly to the printer.

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13.5 Form Letters

(Chapter 13 - Reporting & Other Output Options)

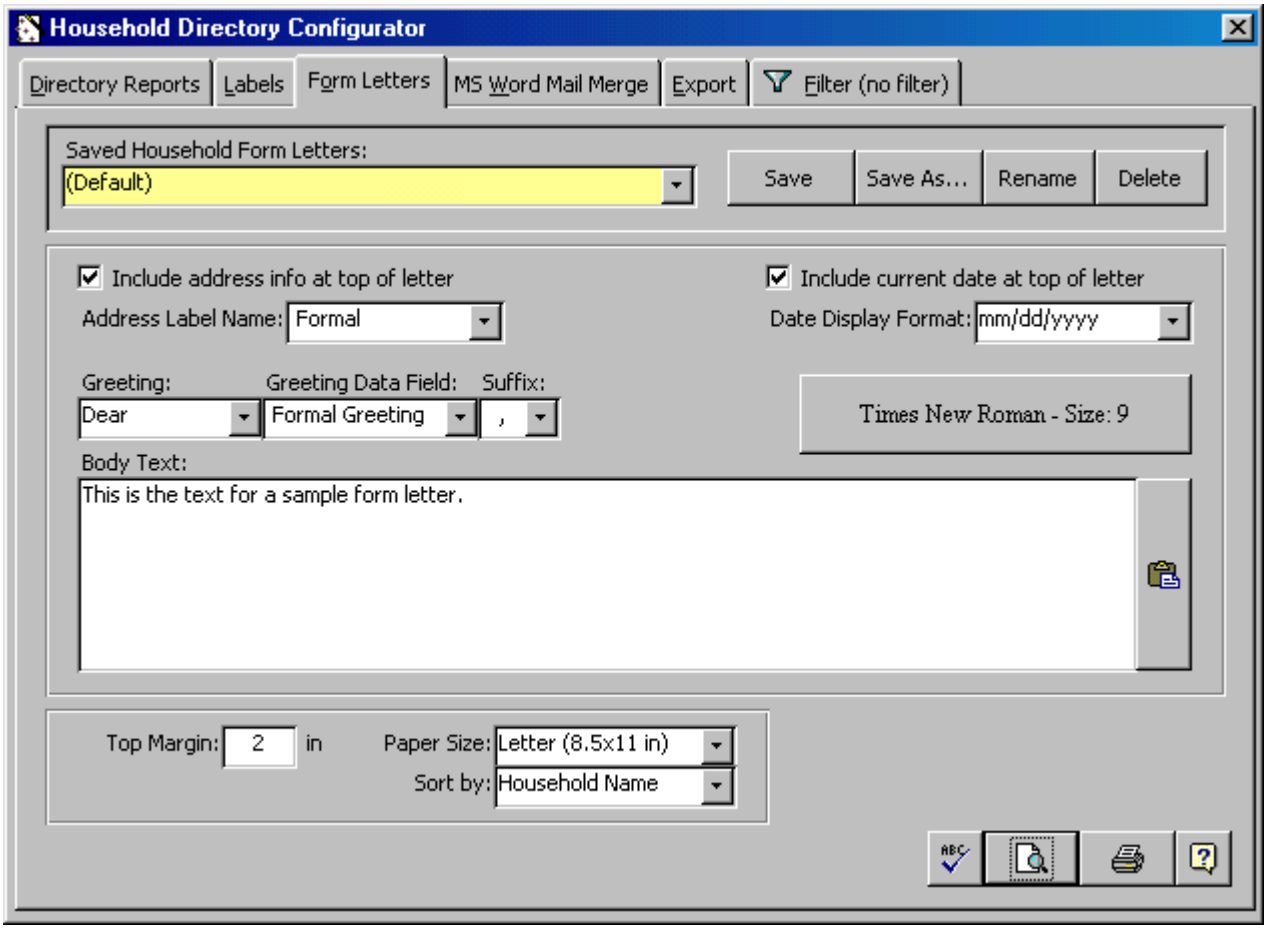


CH2002 provides the ability to easily generate form letters to send to your Household, Individual, and Contact records. Options include flexible sorting options, customizable font settings, Formal and Informal label name and greeting selections, and more.

The following CH2002 report configurators have the ability to generate Form Letters:

- Household Directory Configurator
- Individuals Directory Configurator
- Individuals Milestone Report Configurator
- Contacts Directory Configurator
- Group Membership Directory Configurator
- Contribution Statement Configurator
- Pledge Statement Configurator
- Meeting Absentee Report Configurator
- X-Time Attendance Report Configurator
- Visitations Report Configurator

The report configurators listed above include a "Form Letters" tab to facilitate form letter generation. The controls and functionality found on the "Form Letters" tab are very similar regardless of which report configurator is being used. A screen-shot of the Household Directory Configurator's "Form Letters" tab is shown below:



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The top section of the "Form Letters" tab includes a pull-down control where you can retrieve and use previously saved form letters. These saved form letters configure the controls in the middle and lower section of the "Form Letters" tab. These controls set such parameters as display options, greeting options, body text, sorting options, font settings, etc. You can manually adjust these controls and, if desired, save these settings using the "Save" or "Save As" buttons. The "Save" button will take a snap-shot of the current form letter and save it to the currently displayed Form Letter (in the top yellow pull-down control). Using the "Save As" button allows you to create a new saved Form Letter with your specified name - leaving the currently displayed Form Letter unchanged. The "Rename" button allows you to rename the currently selected Form Letter, while the "Delete" button will delete the currently selected Form Letter.

In the lower right-hand section, both a Print Preview and a Print button are provided. The Print Preview button will allow you to preview the Form Letter report on-screen before sending to the printer, while the Print button allows you to send the Form Letter report directly to the printer.

TIP: The CH2002 form letter generation capabilities are relatively limited in terms of the formatting of the actual form letter text. While basic font setting options are provided, you may need to consider the CH2002 MS Word Mail Merge capabilities if you require a form letter with elaborate layout or text formatting.

TIP: You can use the Paste button just to the right of the "Body Text" field to paste text into the form letter's body from the Windows Clipboard.

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13.6 MS Word Mail Merge

(Chapter 13 - Reporting & Other Output Options)

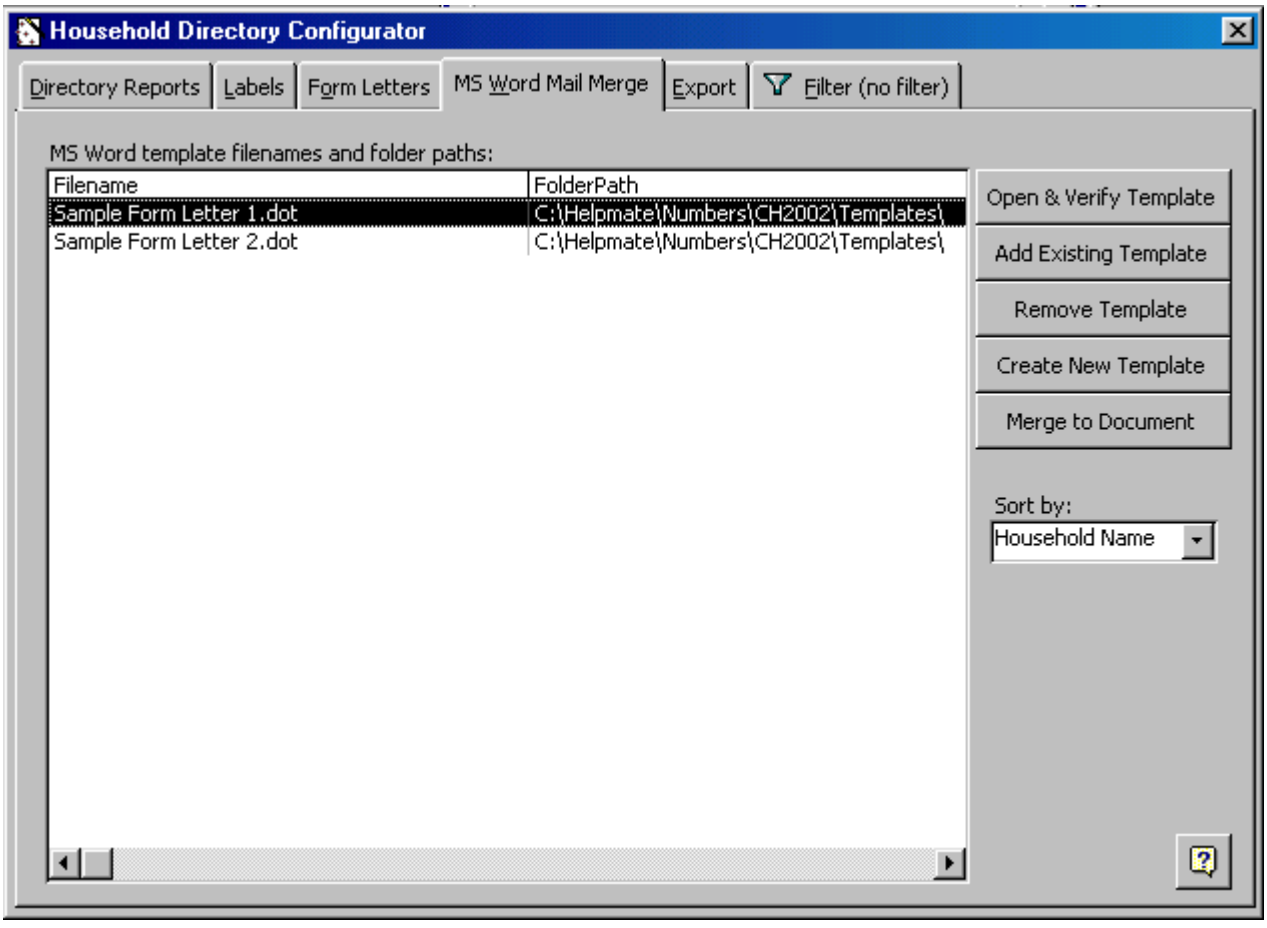


CH2002 provides the ability to easily generate Mail Merge form letters with Microsoft Word (version 97 or newer).

The following CH2002 report configurators have the ability to generate MS Word mail merge form letters:

- Household Directory Configurator
- Individuals Directory Configurator
- Individuals Milestone Report Configurator
- Contacts Directory Configurator
- Group Membership Directory Configurator
- Contribution Statement Configurator
- Pledge Statement Configurator
- Meeting Absentee Report Configurator
- X-Time Attendance Report Configurator
- Visitations Report Configurator

The report configurators listed above include an "MS Word Mail Merge" tab to facilitate MS Word mail merge generation. The controls and functionality found on the "MS Word Mail Merge" tab are very similar regardless of which report configurator is being used. A screen-shot of the Household Directory Configurator's "MS Word Mail Merge" tab is shown below:



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The CH2002 MS Word mail merge capabilities allow you to create and save your MS Word letters and then later choose them from a listing of available documents as shown above in the ListBox control. The ListBox contains 2 columns:

- *Filename*: Displays the actual filename of the MS Word document
- *FolderPath*: Displays the exact folder location of the MS Word document

A series of buttons on the right-hand side of the "MS Word Mail Merge" tab provide maintenance and generation functionality:

Open & Verify Template: This button will open the selected MS Word template file and verify whether or not it meets certain requirements to function as a CH2002/Word mail merge document (see the "Creating CH2002/Word Template Files" section below for details on these requirements).

Add Existing Template: This button will allow you to add an existing MS Word template (.dot) file to the listing of available MS Word mail merge template files on the "MS Word Mail Merge" tab.

Remove Template: This button will allow you to remove a template currently displayed in the ListBox control of the "MS Word Mail Merge" tab. This removal does not actually delete the file from your computer's hard-drive - it simply removes it from the ListBox control.

Create New Template: This button will allow you to create a new MS Word template (.dot) file to be utilized in the CH2002/Word mail merge process. You will first be required to specify a location and filename for your new MS Word template (.dot) file. The new template will then be added to the ListBox control and opened in MS Word (for you to design).

Merge To Document: This button will allow you to process the MS Word mail merge. This process will create a new MS Word document (.doc) file based on the selected MS Word template file. Next, this process will generate a separate letter for each CH2002 record included in the mail merge and will populate the Merge Fields contained in the MS Word document file with the actual CH2002 data. Once this process is completed, you may send the resulting MS Word document to your printer and/or save the document for later retrieval through MS Word.

Creating CH2002/Word Template Files:

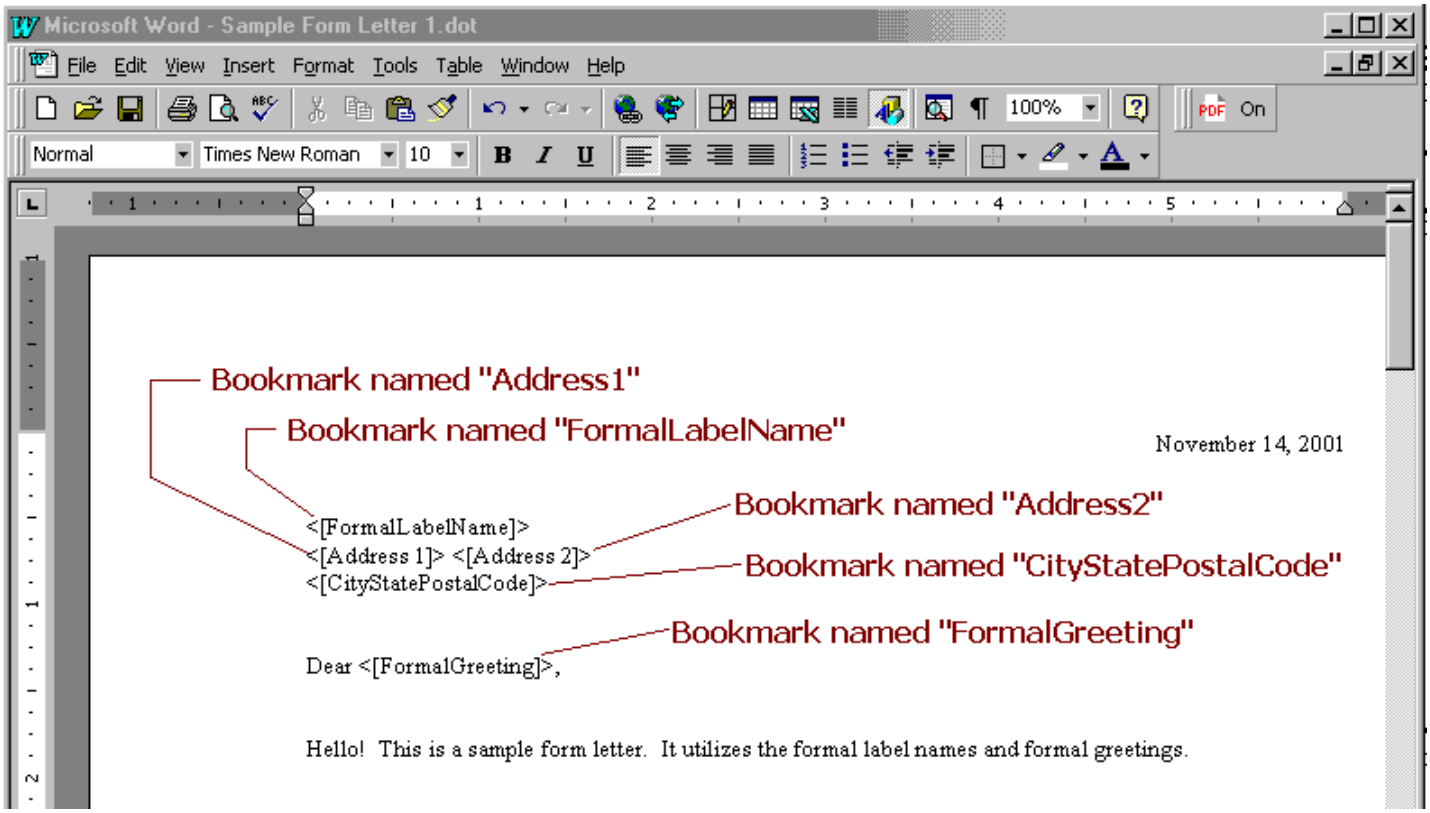
When designing Microsoft Word template (.dot) files to be used in the CH2002 / Word mail merge process, certain guidelines must be adhered to in order to achieve successful mail merge results. CH2002 utilizes MS Word's "Bookmark" feature as an integral part of the CH2002/Word mail merge process. MS Word "bookmarks" allow CH2002 to know where the merge fields exist in your MS Word template file. These merge fields let CH2002 know where to insert the actual CH2002 data (ie. real names and addresses). It is crucial that these bookmarks be defined properly in your MS Word mail merge template files.

When designing your mail merge template file, you will need to position bookmarks where you want the CH2002 data inserted into the document during the merge process. In addition to positioning the bookmarks in the desired location, the bookmark name must be identical to one of the following supported field names:

FormalLabelName
FormalGreeting
InformalLabelName
InformalGreeting
Address1
Address2
City
State
PostalCode
CarrierRoute
CityStatePostalCode
Country

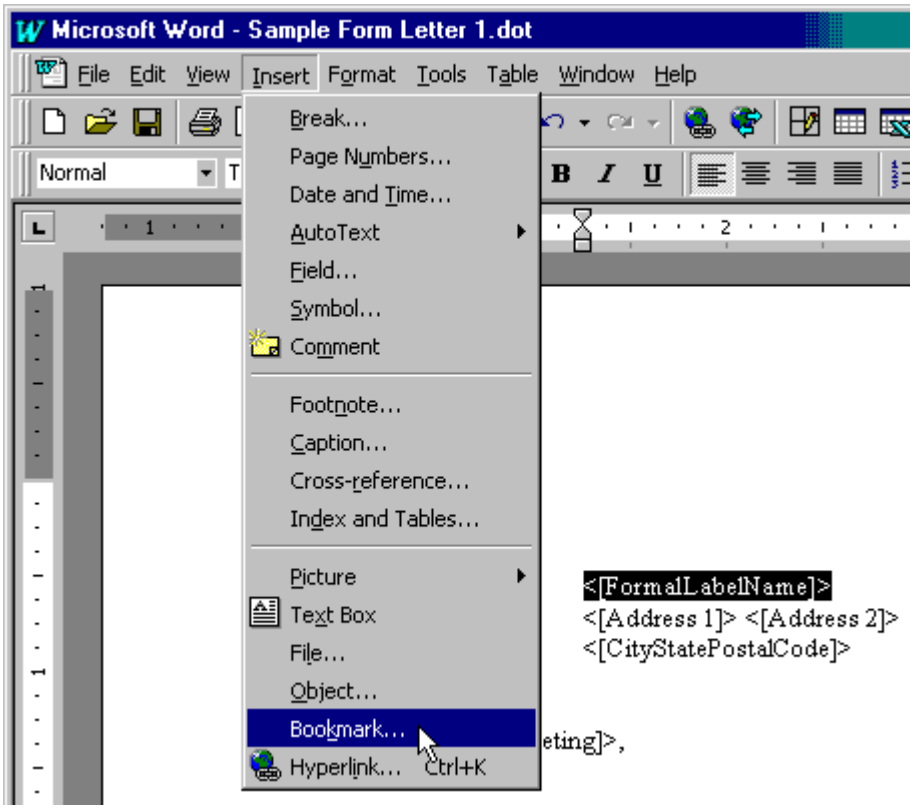
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Therefore, you'll position bookmarks where you want the merge fields to exist in your MS Word template file and the name of the bookmark will determine which CH2002 data field will be inserted into each bookmark location. The screen-shot below displays a sample MS Word mail merge template file with bookmarks identified. Please note that the location and actual text of the bookmark, for example "<[FormalLabelName]>" is not important. What is important is that the actual name of the bookmark - so that it matches one of the field names shown above.

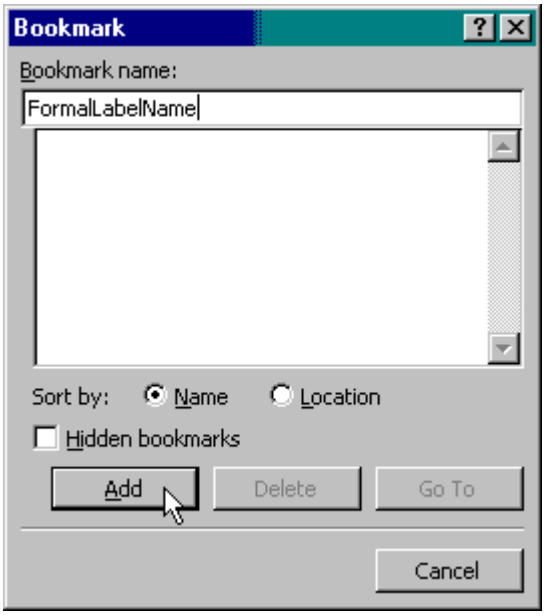


To create a bookmark in MS Word, highlight the text representing the bookmark (for example, "<[FormalLabelName]>"). Then select "Insert | Bookmark" from MS Word's top main menubar as shown below:

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Then, from the Bookmark dialog box, type the desired name of the Bookmark. Again, please note that the name of the bookmark must match 1 of the CH2002 data fields listed above. Then click the "Add" button to create the bookmark as shown below:



We've included 2 sample CH2002/Word mail merge template files with the installation of the CH2002 product. These sample template files can be found in the "Templates" folder just beneath the main "CH2002" folder. The default location is "C:\Program Files\CH2002\Templates". The 2 sample template files are named:

Sample Form Letter 1.dot

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Sample Form Letter 2.dot

You can open these files using MS Word to see first hand how the bookmarks should be utilized. When attempting to design a CH2002 / Word mail merge template file, you can use the "Open & Verify Template" button from the right-hand side of the CH2002 "MS Word Mail Merge" tab to verify the existence of valid Bookmarks in the template file.

TIP: The CH2002 MS Word mail merge form letter generation capabilities allow you to leverage the powerful layout and text formatting capabilities of MS Word. However, to generate simple form letters that do not require elaborate formatting, you may find that the CH2002 Form Letter generation capabilities are simple and quicker to generate.

TIP: The CH2002 MS Word mail merge capability has been designed to function with MS Word version 97 or newer.

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13.7 Exports

(Chapter 13 - Reporting & Other Output Options)



There may be times where it would be desirable to export your CH2002 data records out to an external file. Reasons for this may include:

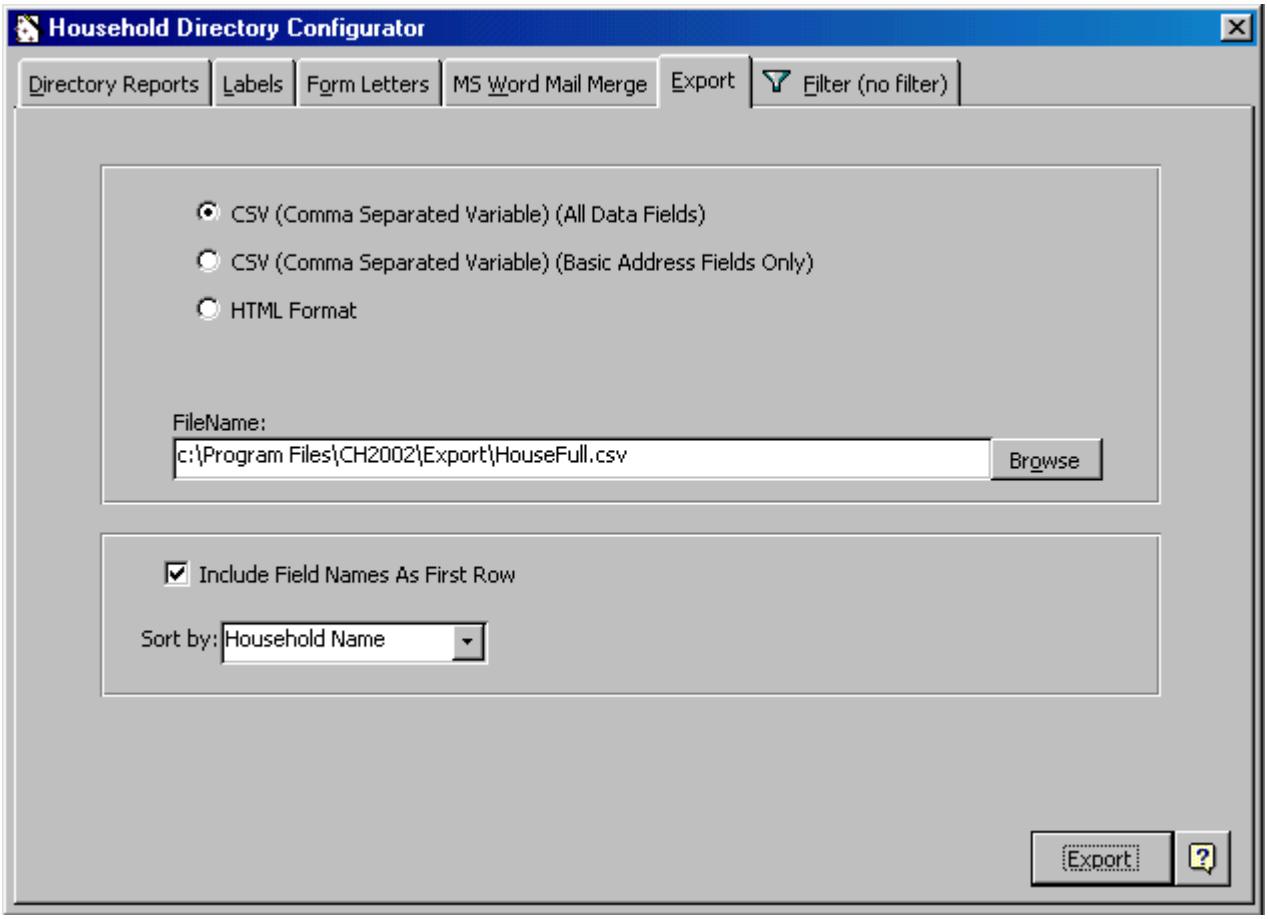
- The desire to further analyze the data in another software tool such as MS Excel.
- The desire to process mail merges with products other than MS Word such as Word Perfect.
- The desire to use third party bulk mailing services.

The following CH2002 report configurators have the ability to Export data:

- Household Directory Configurator
- Individuals Directory Configurator
- Individuals Milestone Report Configurator
- Contacts Directory Configurator
- Group Membership Directory Configurator
- Contribution Statement Configurator
- Contribution Batch Report Configurator
- Pledge Statement Configurator
- Individual Attendance Report Configurator
- Meeting Absentee Report Configurator
- Meeting Attendance Report Configurator
- Meeting Summary Report Configurator
- Percentage Attendance Report Configurator
- X-Time Attendance Report Configurator
- Visitations Report Configurator

The report configurators listed above include an "Export" tab to facilitate the export process. The controls and functionality found on the "Export" tab are very similar regardless of which report configurator is being used. A screen-shot of the Household Directory Configurator's "Export" tab is shown below:

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Exporting options typically include:

- Choice of either CSV (comma separated variable) or HTML file format
- Sorting options
- Option to include the data field names as the first row of the exported file
- Folder path and filename for the exported file

The "Export" button will export the data using the specified options.

NOTE REGARDING EXPORT FILE FORMATS:

- Comma Separated Variable (CSV)

  Readable by most text editors such as the Windows Notepad and Wordpad applications as well as most spreadsheet-type applications such as Microsoft Excel and Lotus 123.

- Hypertext Markup Language (HTML)

  Readable by Internet web browsers such as Microsoft Explorer and Netscape Navigator as well as by many Word processing applications such as Microsoft Word.

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13.8 Filtering Options

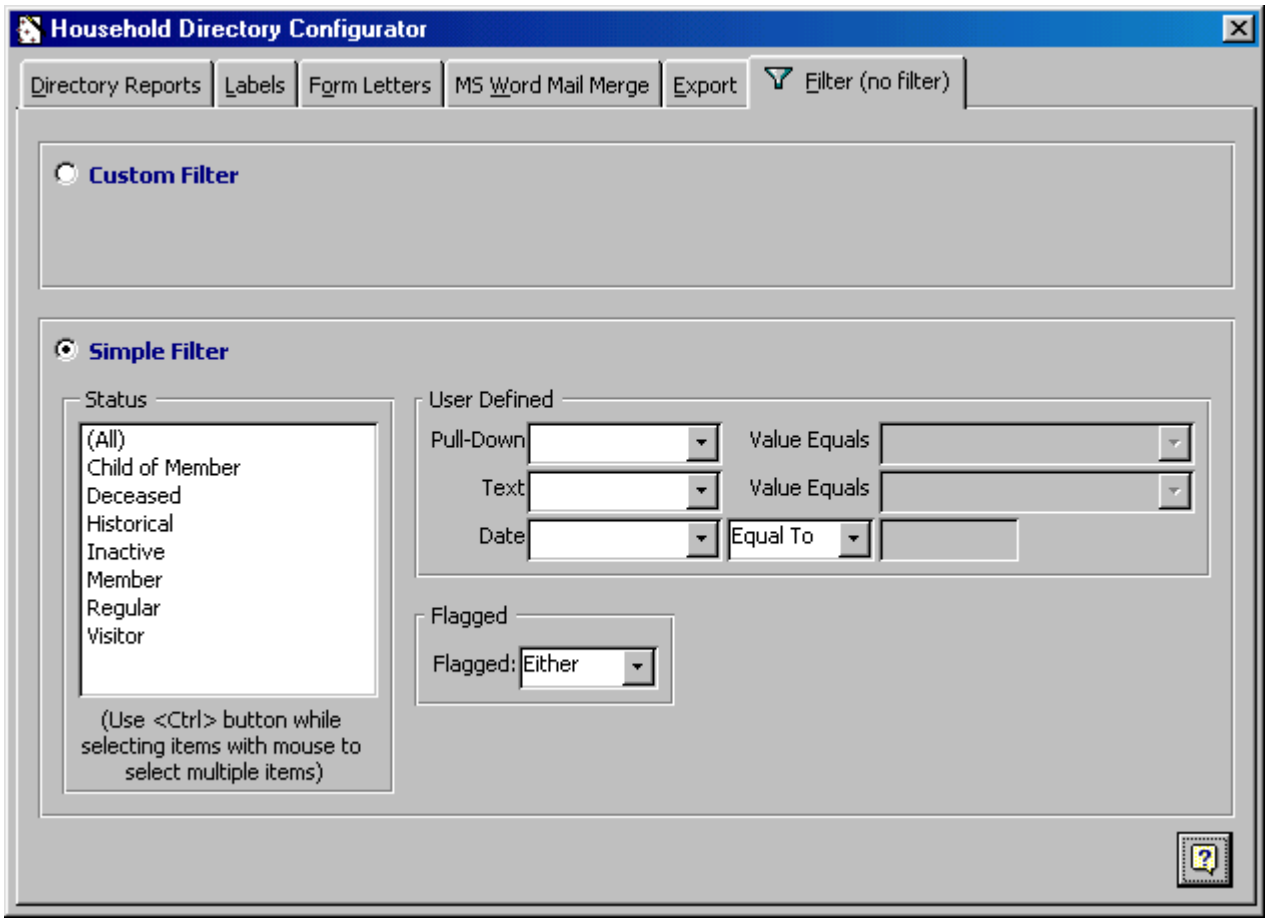
(Chapter 13 - Reporting & Other Output Options)

Many of the CH2002 report configurators provide a "Filter" tab for you to implement filtering criteria to your report, mail label, form letter, and export generation. Filtering allows you to limit the included records to a subset meeting some specified criteria.

Let's look at the Household Directory Configurator as an example. If you do nothing on the "Filter" tab of this report configurator, ALL household records in the CH2002 database will be included when you go to generate a household directory report. This may not be what you want. You could use the "Filter" tab of the report configurator to specify that you only wish to include, for example, household records whose membership Status is "Member" or "Regular".

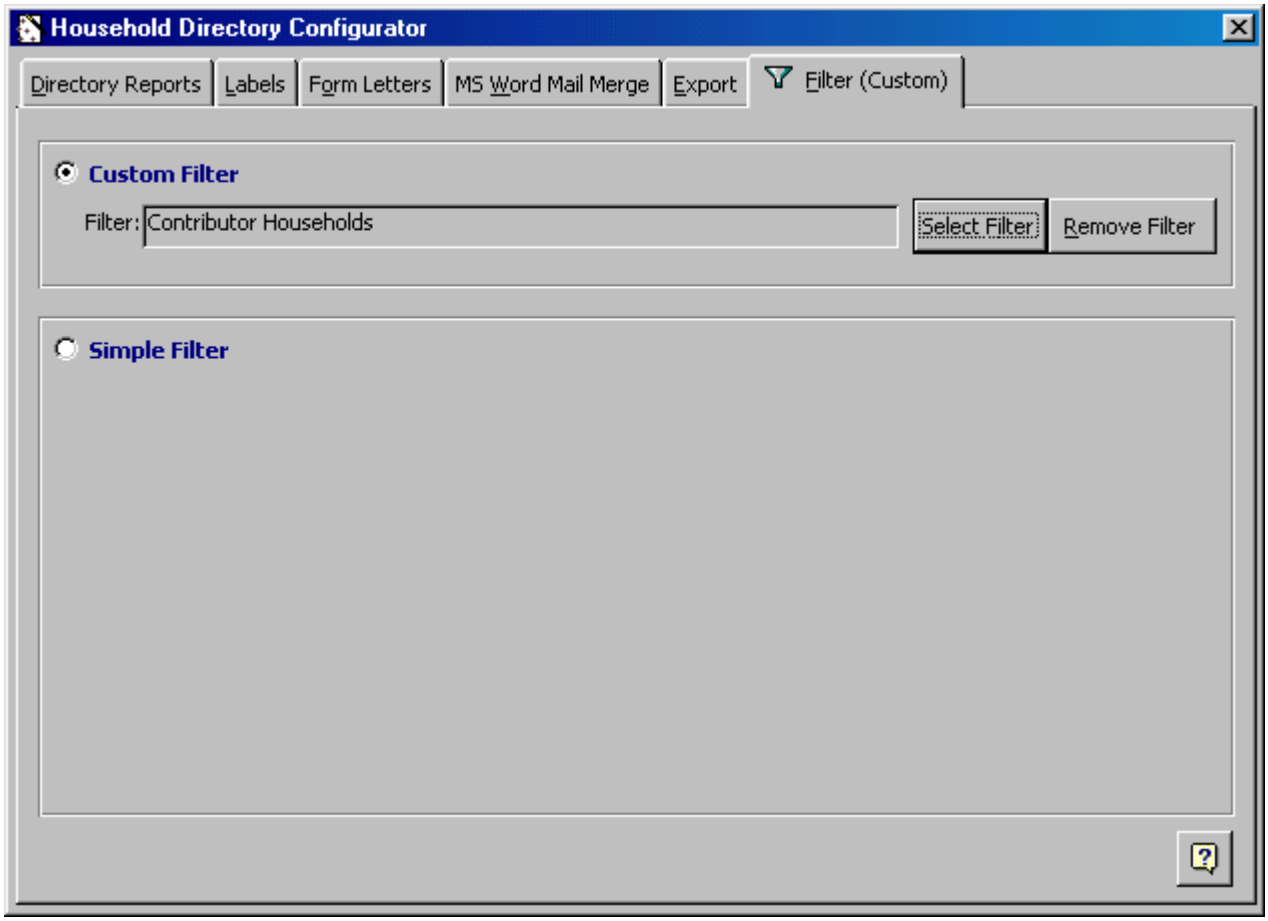
Typically, the "Filter" tab of a report configurator will provide a choice between utilizing a "Simple" and a "Custom" filter.

SIMPLE FILTER OPTION: Let's you specify filter criteria using some basic controls as shown below.



CUSTOM FILTER OPTION: Let's you utilize the Custom Filter Builder to apply more complex filtering criteria.

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13.9 Household-based Outputs

13.9.1 Household-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Household-based output options are provided by the household-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Household Reports" from the Navigation Menu or from the top main menubar.



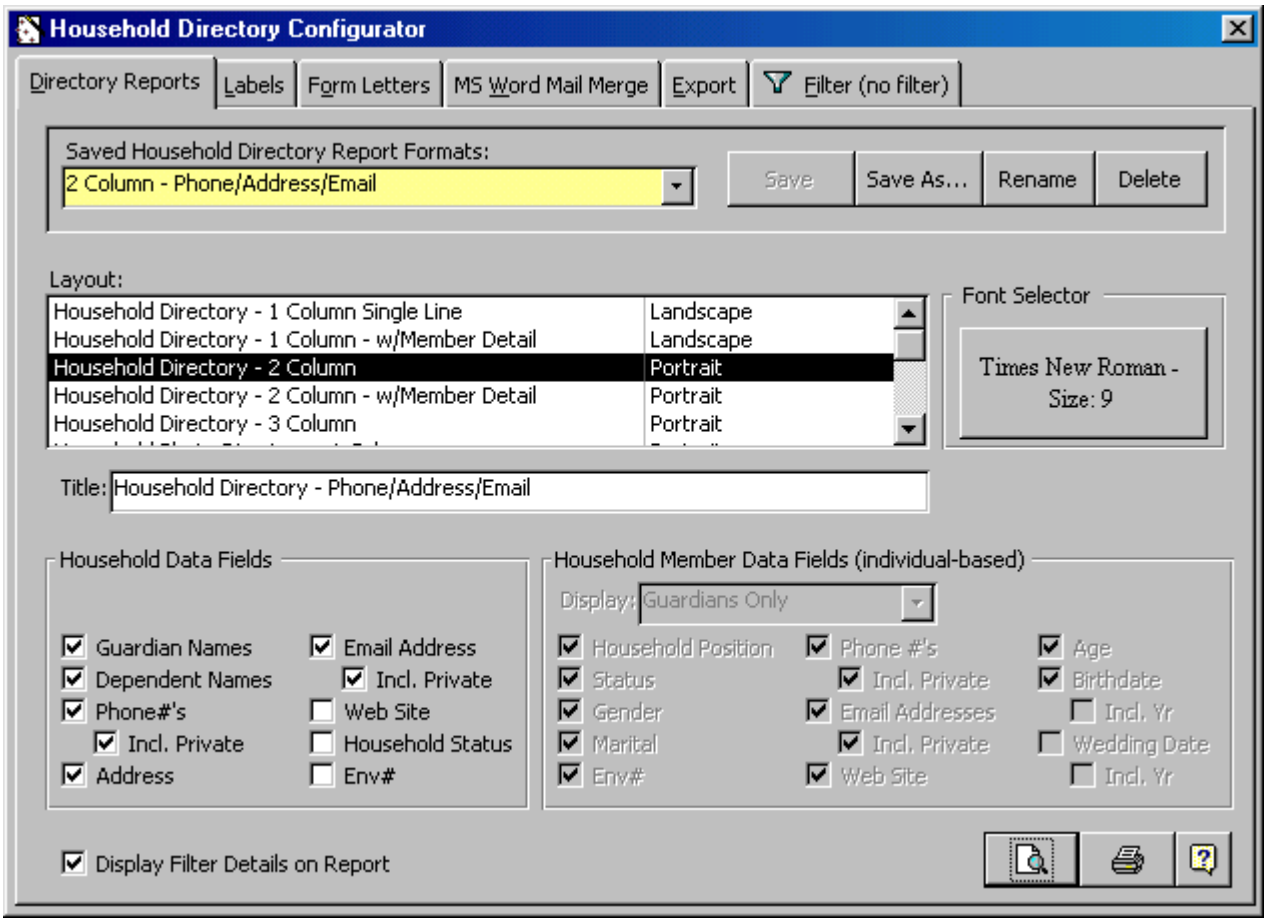
The following Household-based report configurators are provided:

- Household Directory Configurator
- Household Profile Report Configurator
- Household Statistics Report Configurator
- Household Utility Report Configurator

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13.9.2 Household Directory Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Household records

OUTPUT OPTIONS:

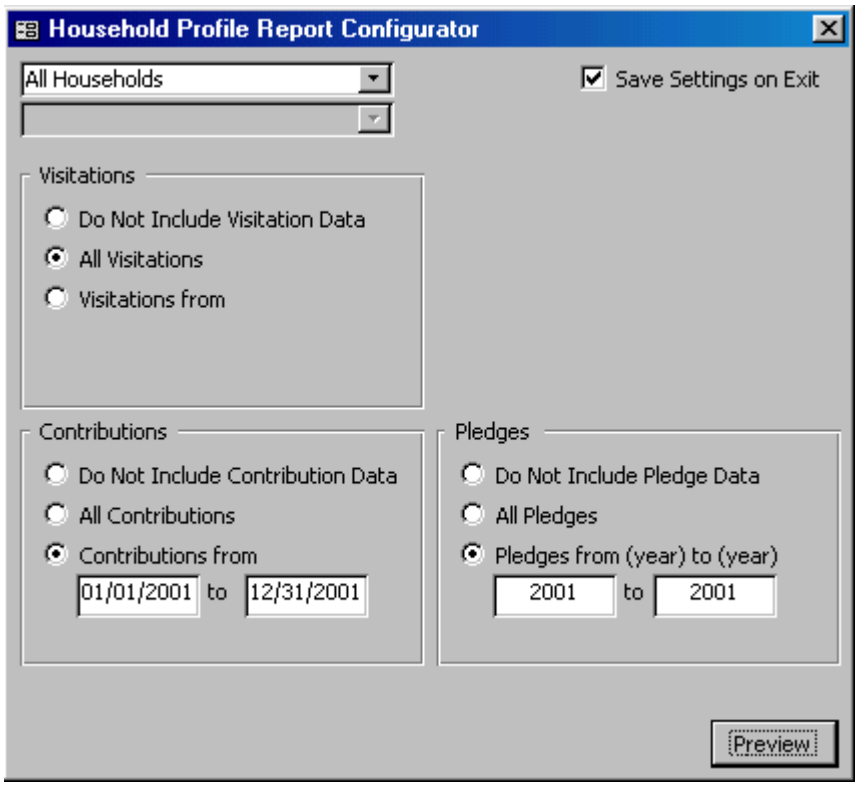


GENERAL DESCRIPTION: Used to generate desired output for Household records. Allows for filtering to include only a subset of Household records.

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13.9.3 Household Profile Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Household records

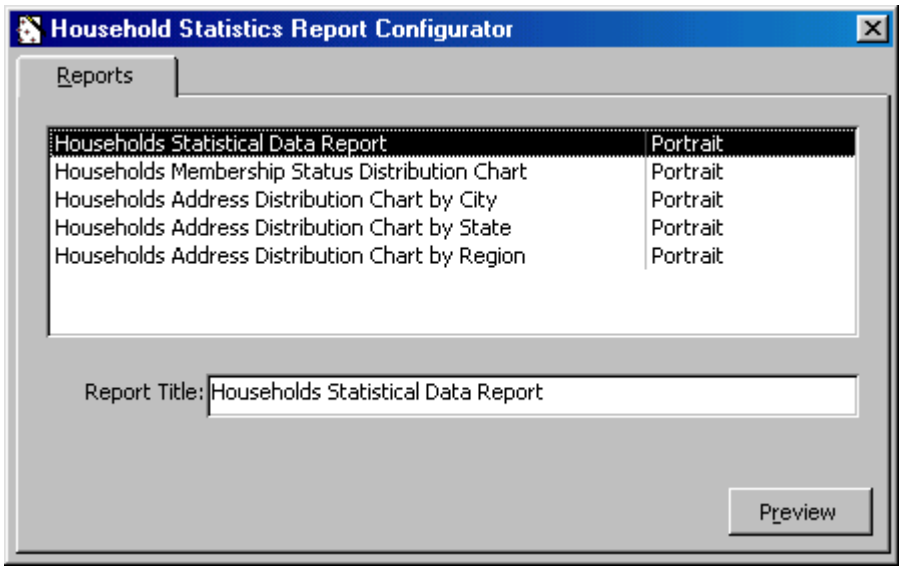
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Used to generate detailed printed reports on 1 or more Household records. Report includes all data fields associated with Household records. Also allows options to include the Household's Visitation, Contribution, and Pledge records.

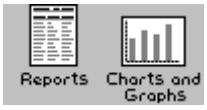
(c) Copyright 2001 Helpmate Technology Solutions

13.9.4 Household Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Household records

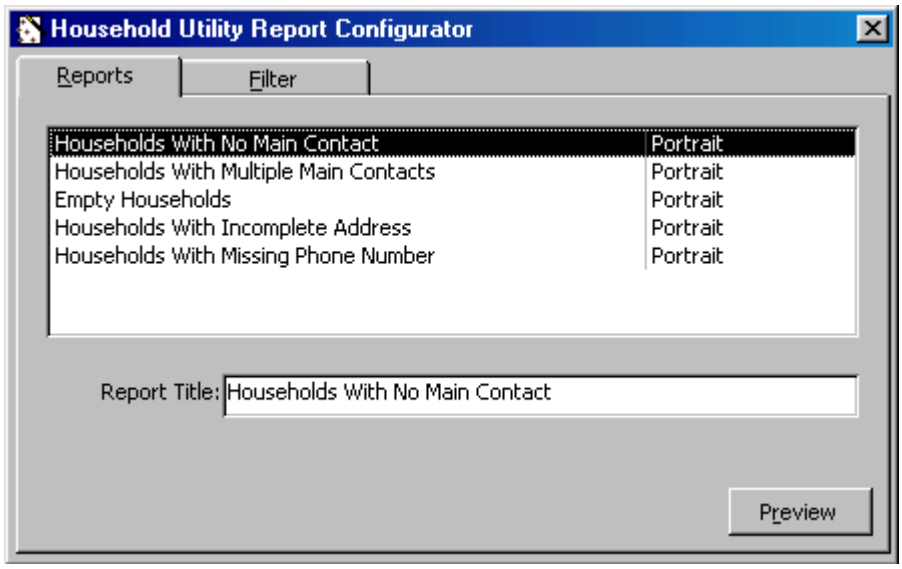
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several statistical-type reports such as distribution analysis reports that show, for example, how many Households are from a particular city, state, or postal code.

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13.9.5 Household Utility Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Household records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several utility/maintenance type reports such as a report of all of the Household records with no individuals assigned to them (empty households) or Households with missing addresses.

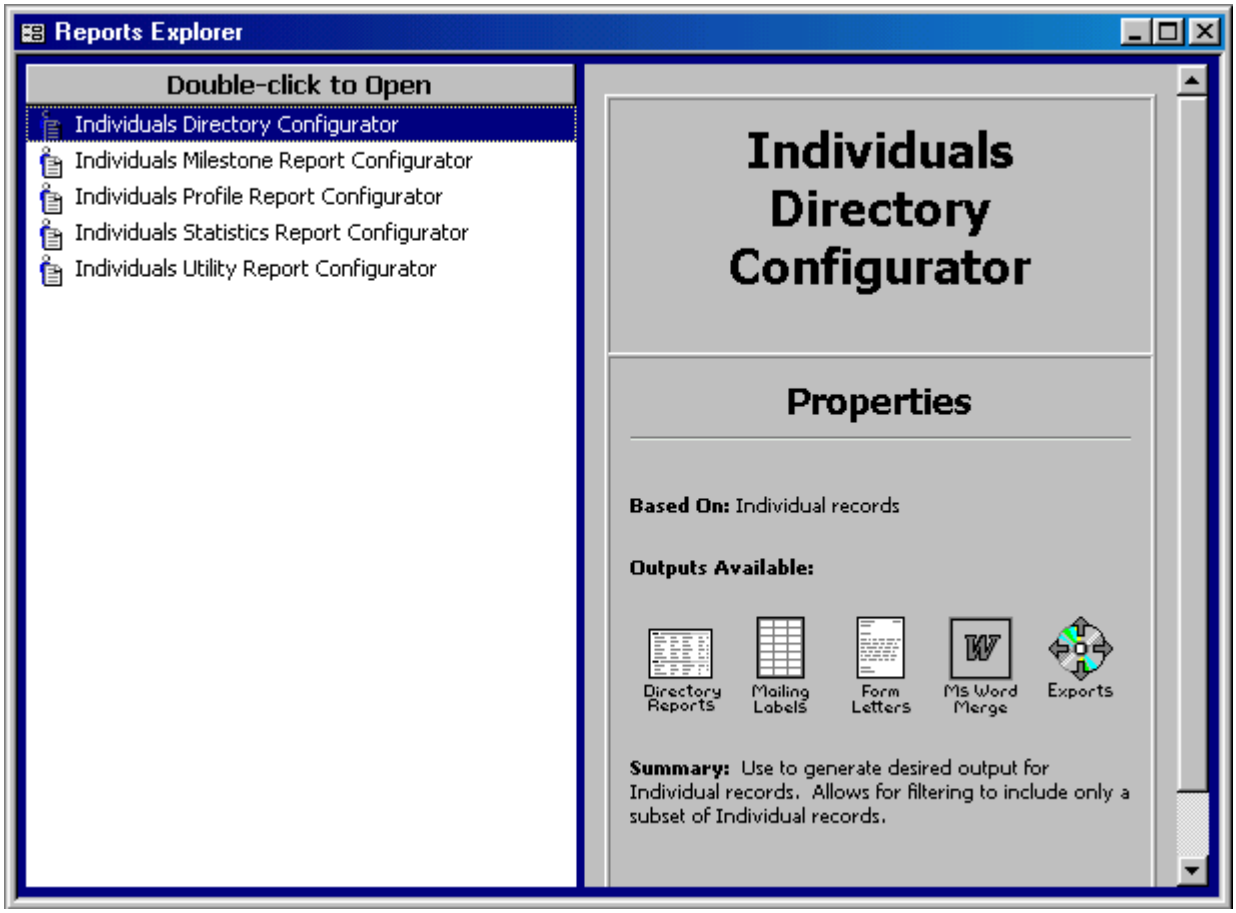
(c) Copyright 2001 Helpmate Technology Solutions

13.10 Individuals-based Outputs

13.10.1 Individual-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Individual-based output options are provided by the individual-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Individual Reports" from the Navigation Menu or from the top main menubar.



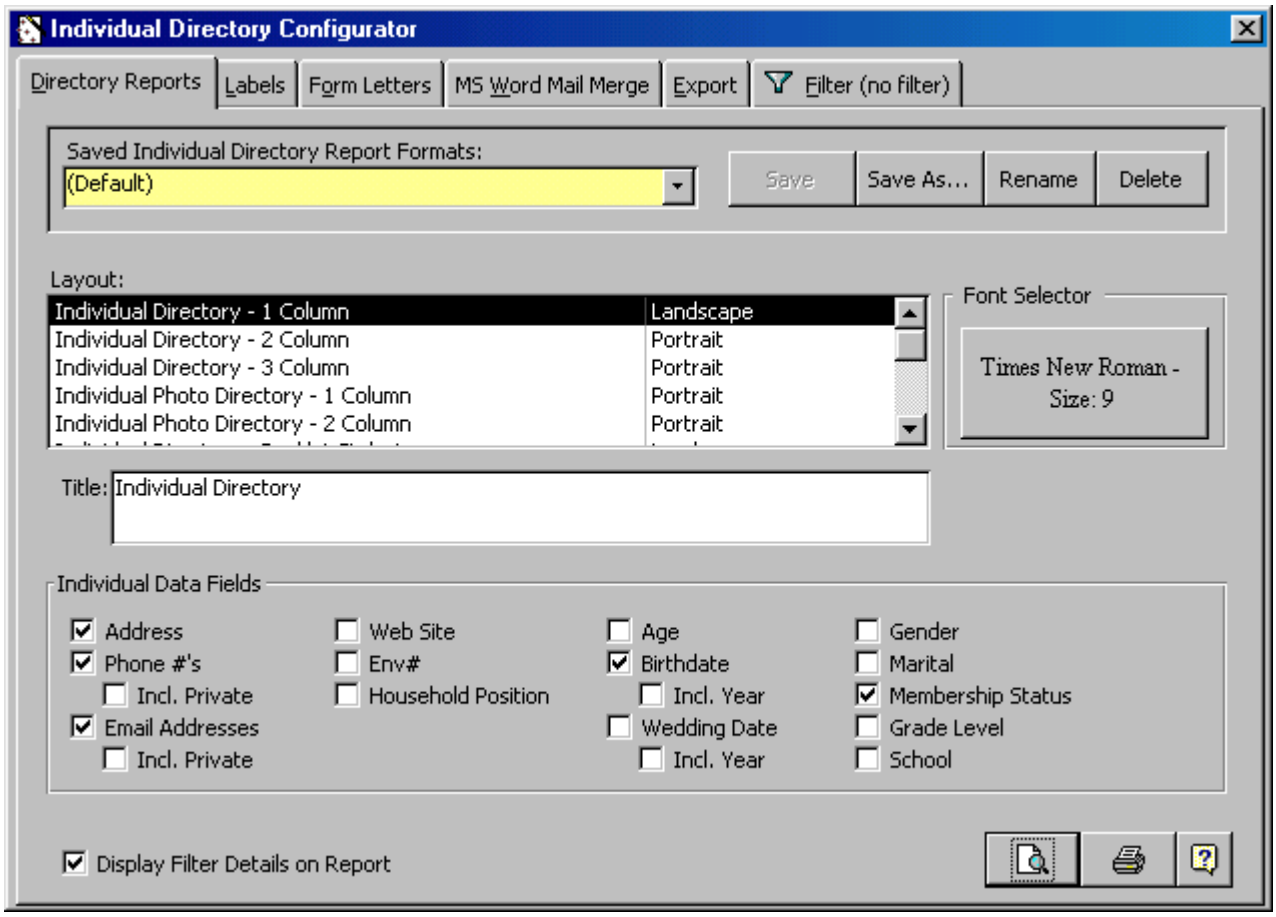
The following Individual-based report configurators are provided:

- Individuals Directory Configurator
- Individuals Milestone Report Configurator
- Individuals Profile Report Configurator
- Individuals Statistics Report Configurator
- Individuals Utility Report Configurator

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13.10.2 Individuals Directory Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Individual records

OUTPUT OPTIONS:

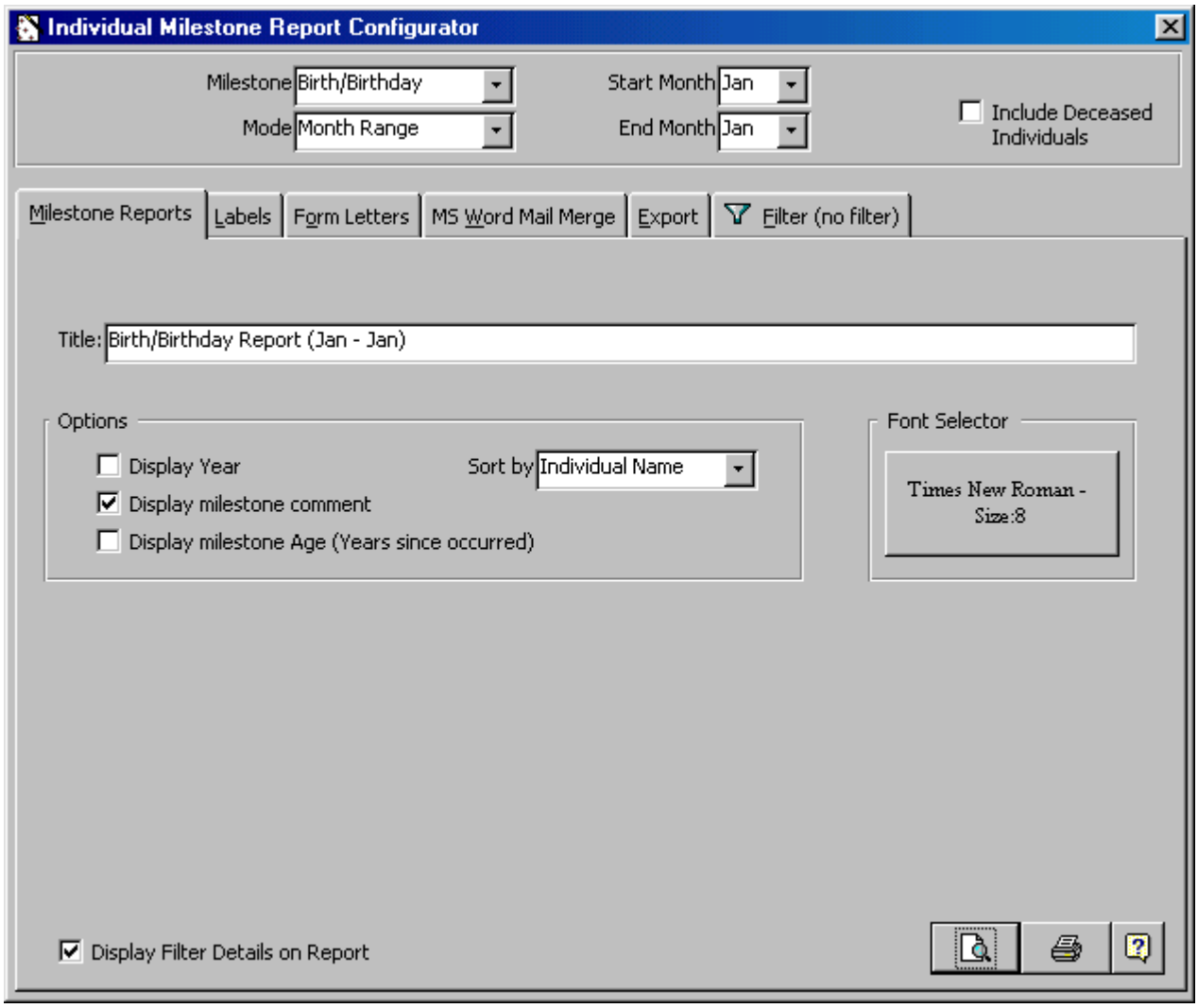


GENERAL DESCRIPTION: Used to generate desired output for Individual records. Allows for filtering to include only a subset of Individual records.

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13.10.3 Individuals Milestone Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Individual records

OUTPUT OPTIONS:

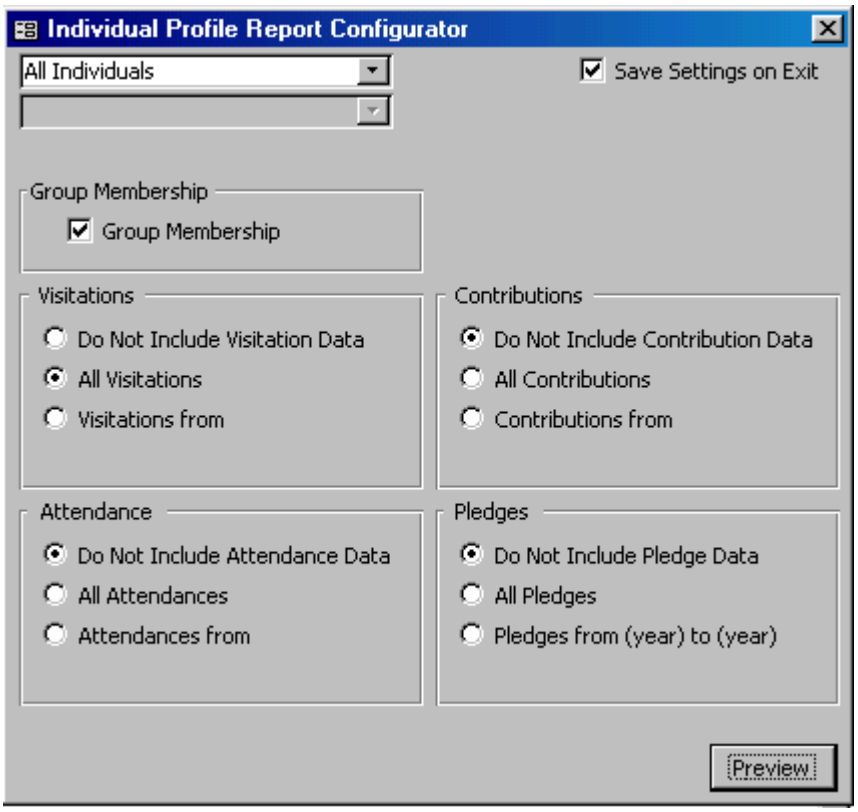


GENERAL DESCRIPTION: Use to generate desired output for Individual records based on the Individual Milestone events such as Birthdate, Baptism, 1st Visit, Wedding Date, and more.

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13.10.4 Individuals Profile Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Individual records

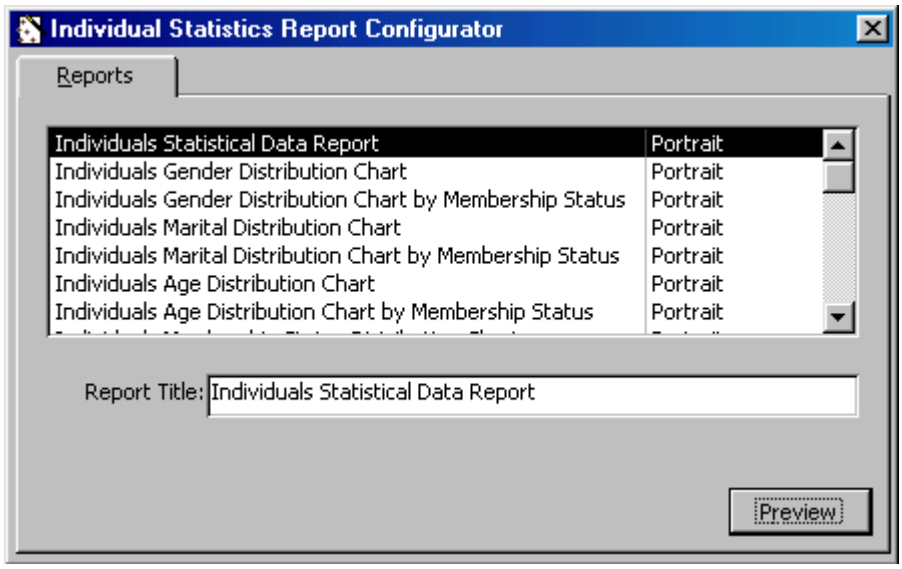
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate detailed printed reports on 1 or more Individual records. Report includes all data fields associated with Individual records. Also allows options to include the Individual's Attendance, Group Membership, Visitation, Contribution, and Pledge records.

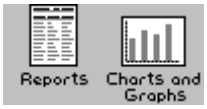
(c) Copyright 2001 Helpmate Technology Solutions

13.10.5 Individuals Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Individual records

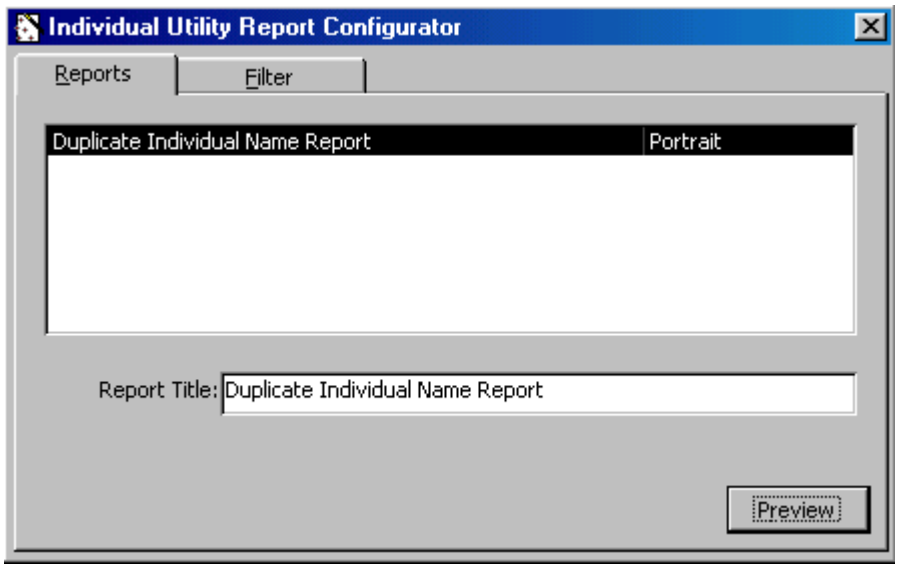
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several statistical-type reports such as distribution analysis reports that show, for example, the distribution of Individuals based on their gender, membership status, marital status, and age.

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13.10.6 Individual Utility Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Individual records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate utility-type reports such as a report of any duplicate Individual names.

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13.11 Contact-based Outputs

13.11.1 Contact-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Contact-based output options are provided by the Contact-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Contact Reports" from the Navigation Menu or from the top main menubar.



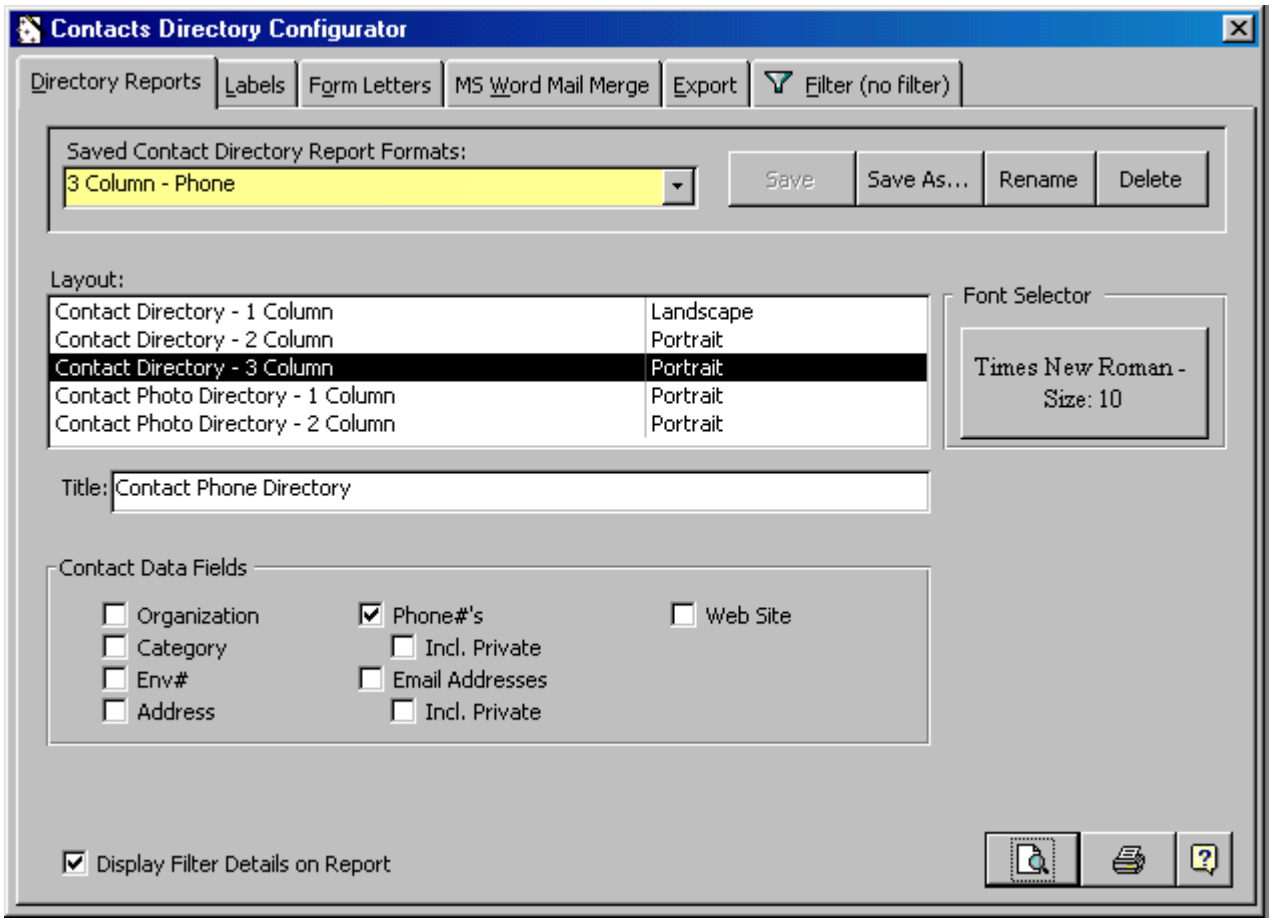
The following Contact-based report configurators are provided:

- Contacts Directory Configurator
- Contacts Profile Report Configurator
- Contacts Statistics Report Configurator
- Contacts Utility Report Configurator

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13.11.2 Contacts Directory Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contact records

OUTPUT OPTIONS:

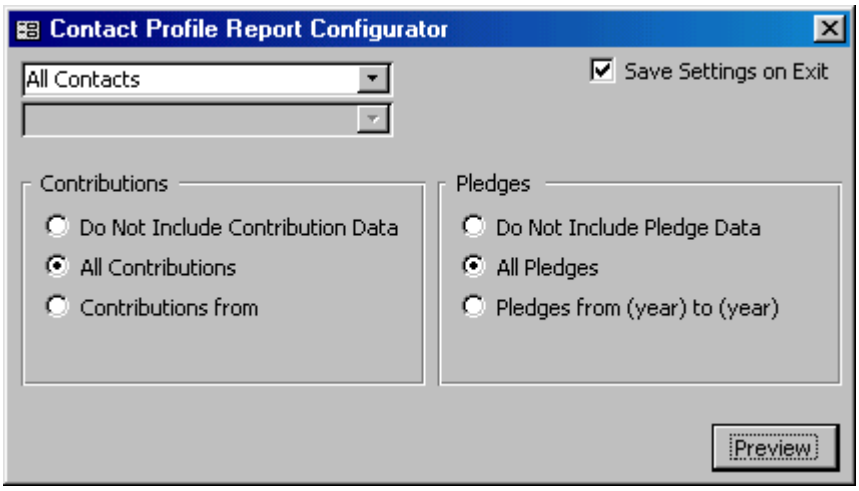


GENERAL DESCRIPTION: Used to generate desired output for Contact records. Allows for filtering to include only a subset of Contact records.

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13.11.3 Contacts Profile Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contact records

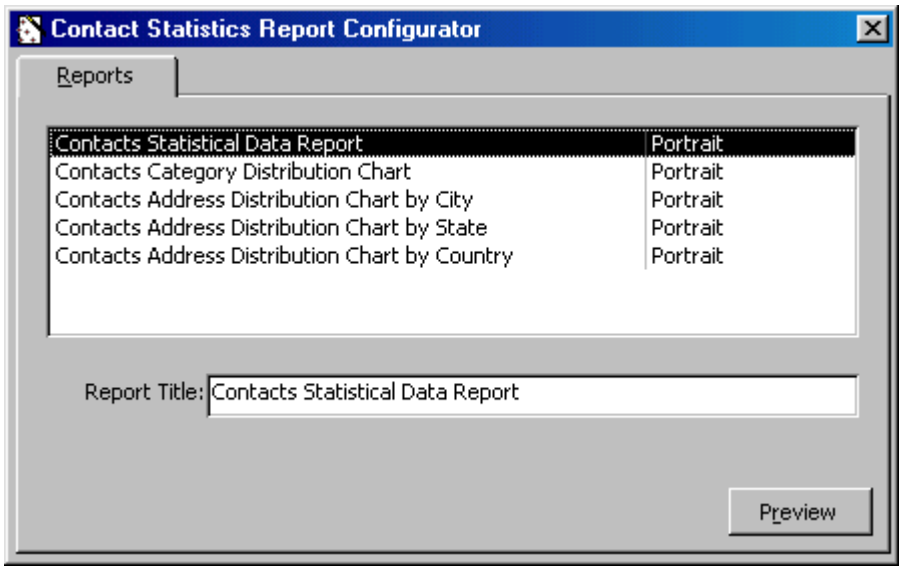
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate detailed printed reports on 1 or more Contact records. Report includes all data fields associated with Contact records. Also allows options to include the Contact's Contribution and Pledge records.

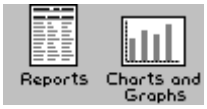
(c) Copyright 2001 Helpmate Technology Solutions

13.11.4 Contacts Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contact records

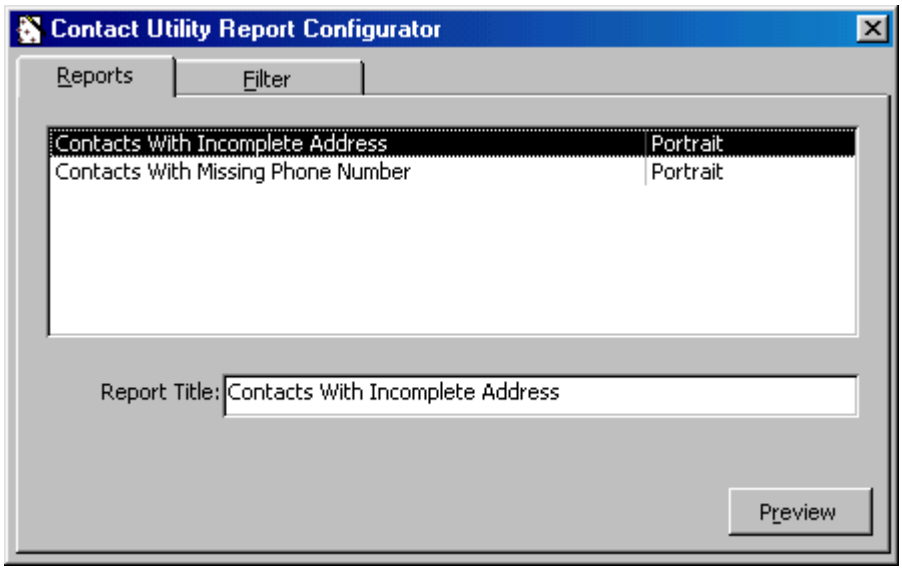
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several statistical-type reports such as distribution analysis reports that show, for example, how many Contacts are from a particular city, state, or postal code.

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13.11.5 Contacts Utility Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contact records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several utility-type reports such as a report of Contact records with no stored address or phone number.

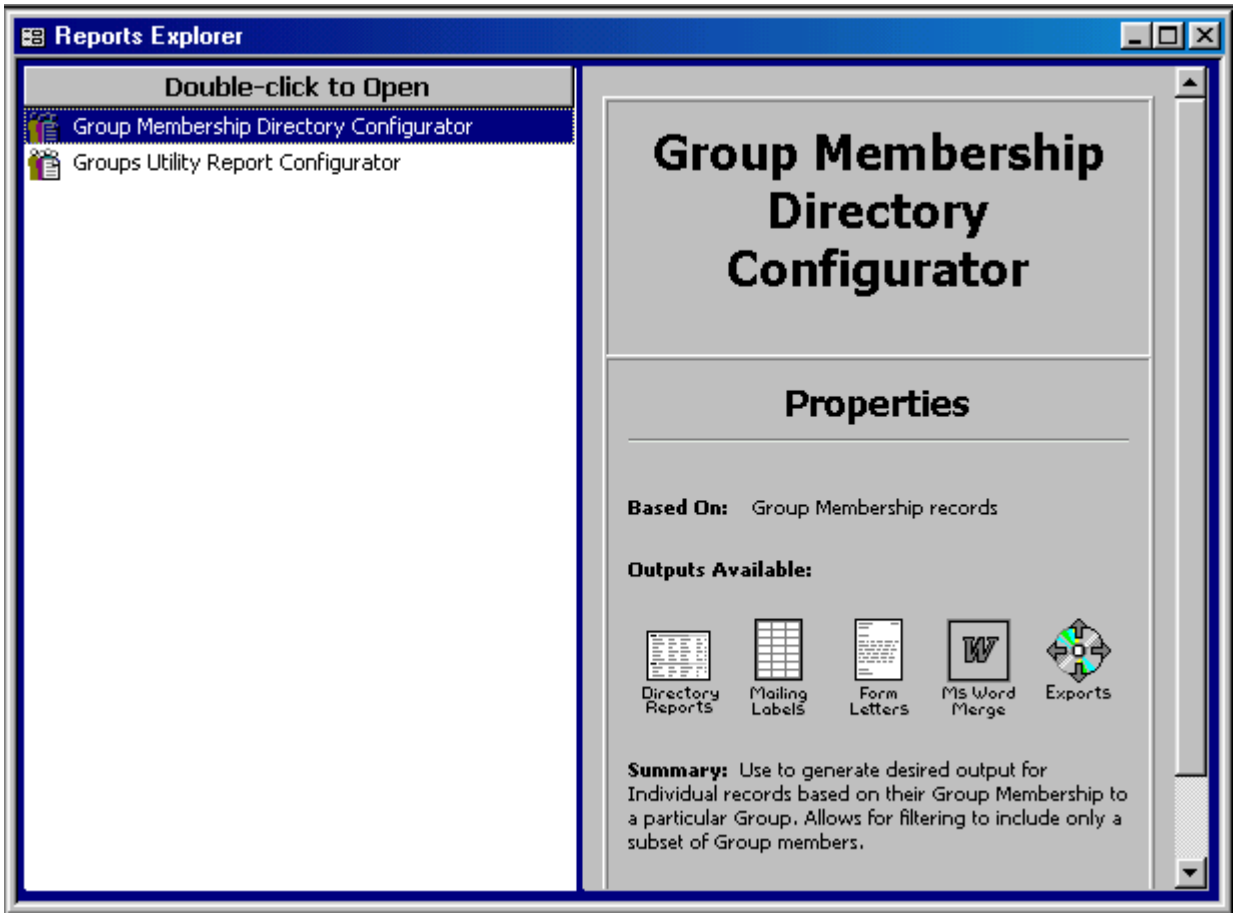
(c) Copyright 2001 Helpmate Technology Solutions

13.12 Group-based Outputs

13.12.1 Group-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Group-based output options are provided by the Group-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Group Reports" from the Navigation Menu or from the top main menubar.


Reports Explorer
Double-click to Open
Group Membership Directory Configurator
Groups Utility Report Configurator
Group Membership Directory Configurator
Properties
Based On: Group Membership records
Outputs Available:
Directory Reports
Mailing Labels
Form Letters
Ms Word Merge
Exports
Summary: Use to generate desired output for Individual records based on their Group Membership to a particular Group. Allows for filtering to include only a subset of Group members.

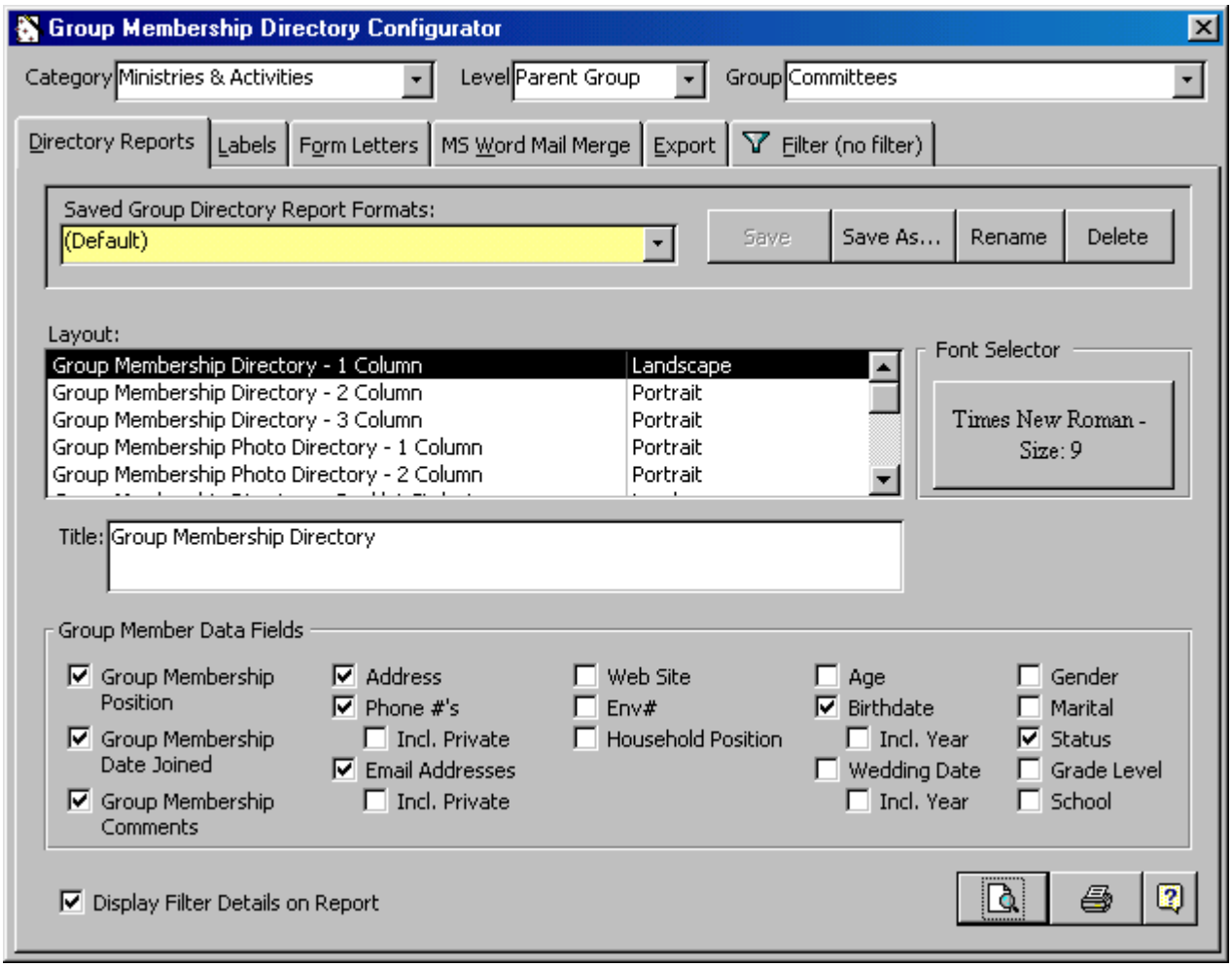
The following Group-based report configurators are provided:

- Group Membership Directory Configurator
- Groups Utility Report Configurator

(c) Copyright 2001 Helpmate Technology Solutions

13.12.2 Group Membership Directory Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Group Membership records

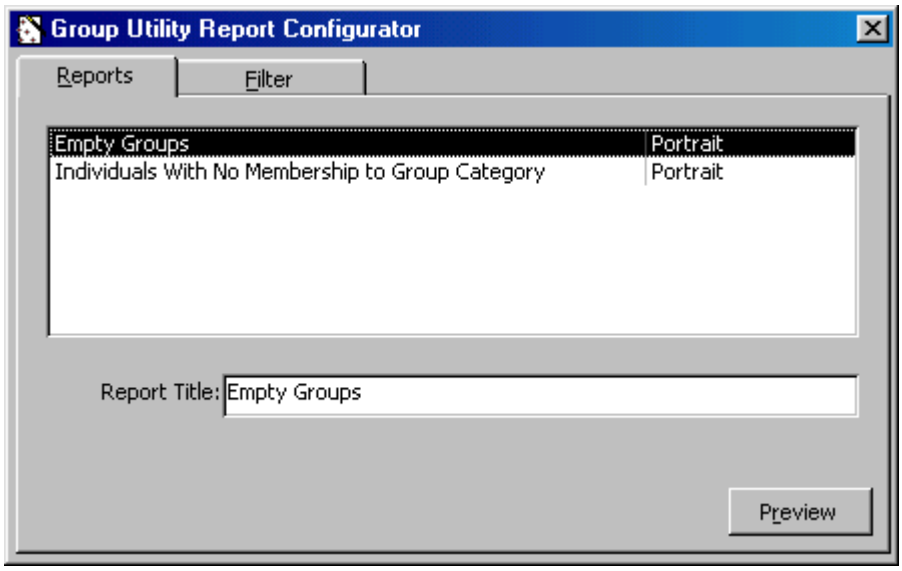
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate desired output for Individual records based on their Group Membership to a particular Group. Allows for filtering to include only a subset of Group members.

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13.12.3 Groups Utility Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Group and Group Membership records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate utility-type reports such as a report of all Individuals that have no membership to a particular Group category.

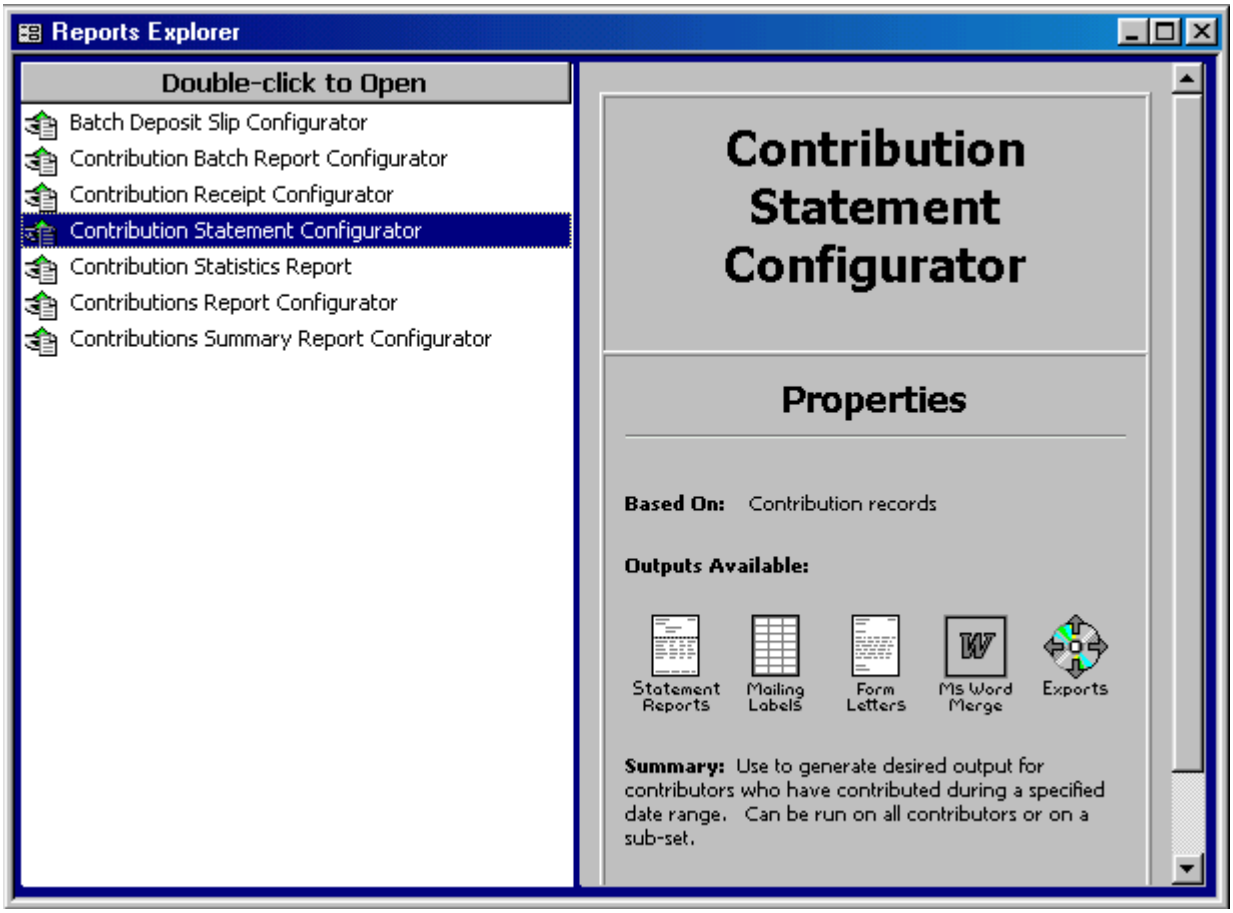
(c) Copyright 2001 Helpmate Technology Solutions

13.13 Contribution-based Outputs

13.13.1 Contribution-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Contribution-based output options are provided by the Contribution-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Contribution Reports" from the Navigation Menu or from the top main menubar.



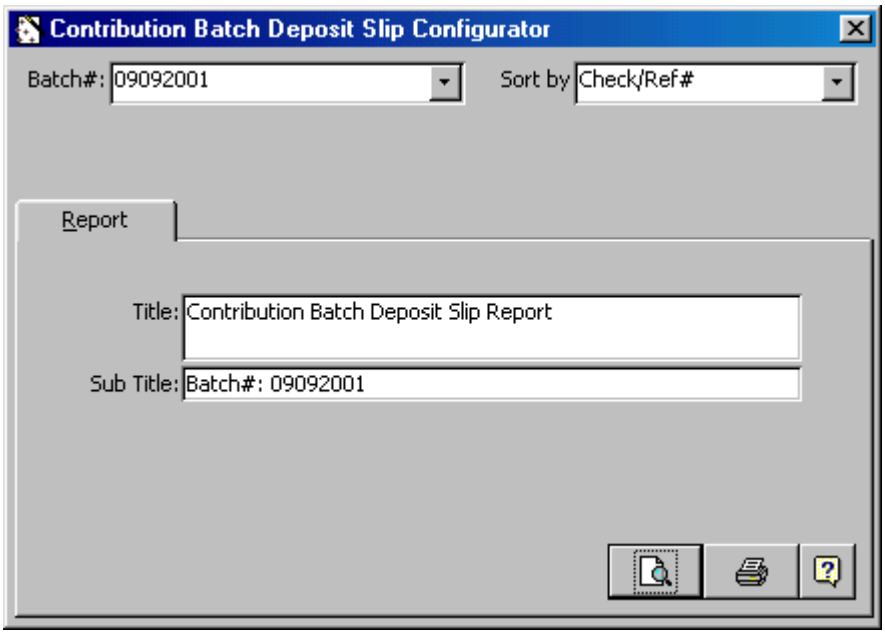
The following Contribution-based report configurators are provided:

- Batch Deposit Slip Configurator
- Contribution Batch Report Configurator
- Contribution Receipt Configurator
- Contribution Statement Configurator
- Contribution Statistics Report Configurator
- Contributions Report Configurator
- Contributions Summary Report Configurator

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13.13.2 Batch Deposit Slip Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contribution records

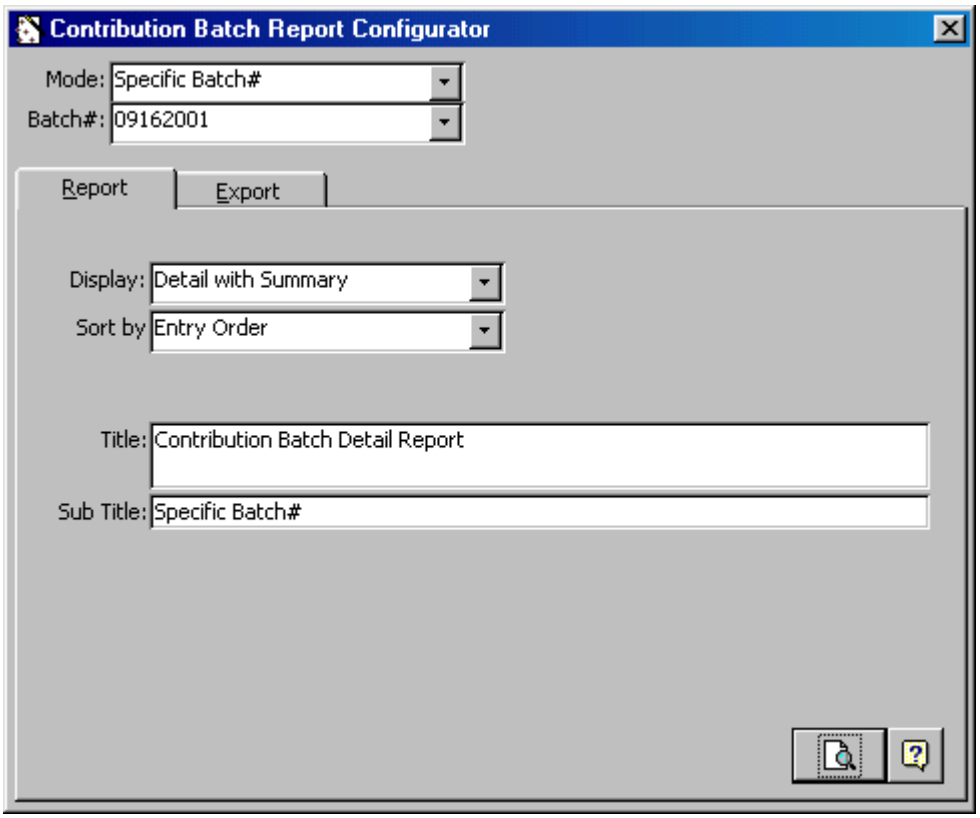
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a deposit slip for a selected Batch record. Deposit slip lists check#'s in Batch and displays Batch totals by check and by cash.

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13.13.3 Contribution Batch Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contribution records

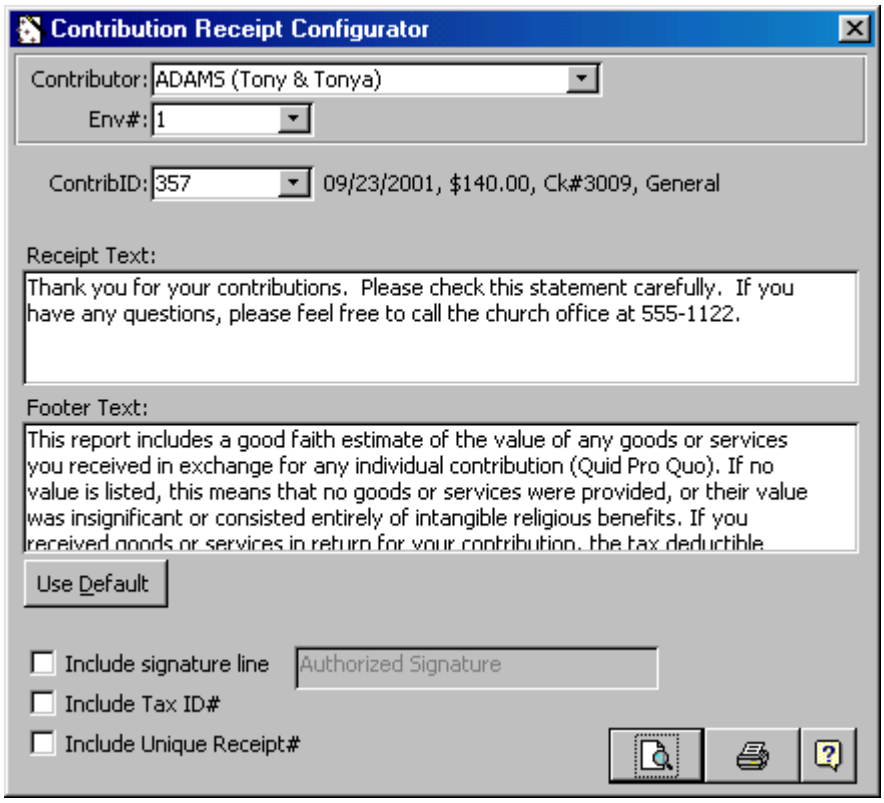
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate Contribution reports or exports for a specific or range of Contribution Batch records. Report can include detail for all contribution records contained in batch or summary totals only (no detail).

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13.13.4 Contribution Receipt Configurator

(Chapter 13 - Reporting & Other Output Options)


Contribution Receipt Configurator
Contributor: ADAMS (Tony & Tonya)
Env#: 1
ContribID: 357
09/23/2001, $140.00, Ck#3009, General
Receipt Text:
Thank you for your contributions. Please check this statement carefully. If you have any questions, please feel free to call the church office at 555-1122.
Footer Text:
This report includes a good faith estimate of the value of any goods or services you received in exchange for any individual contribution (Quid Pro Quo). If no value is listed, this means that no goods or services were provided, or their value was insignificant or consisted entirely of intangible religious benefits. If you
Use Default
Include signature line
Authorized Signature
Include Tax ID#
Include Unique Receipt#

BASED ON: Contribution records

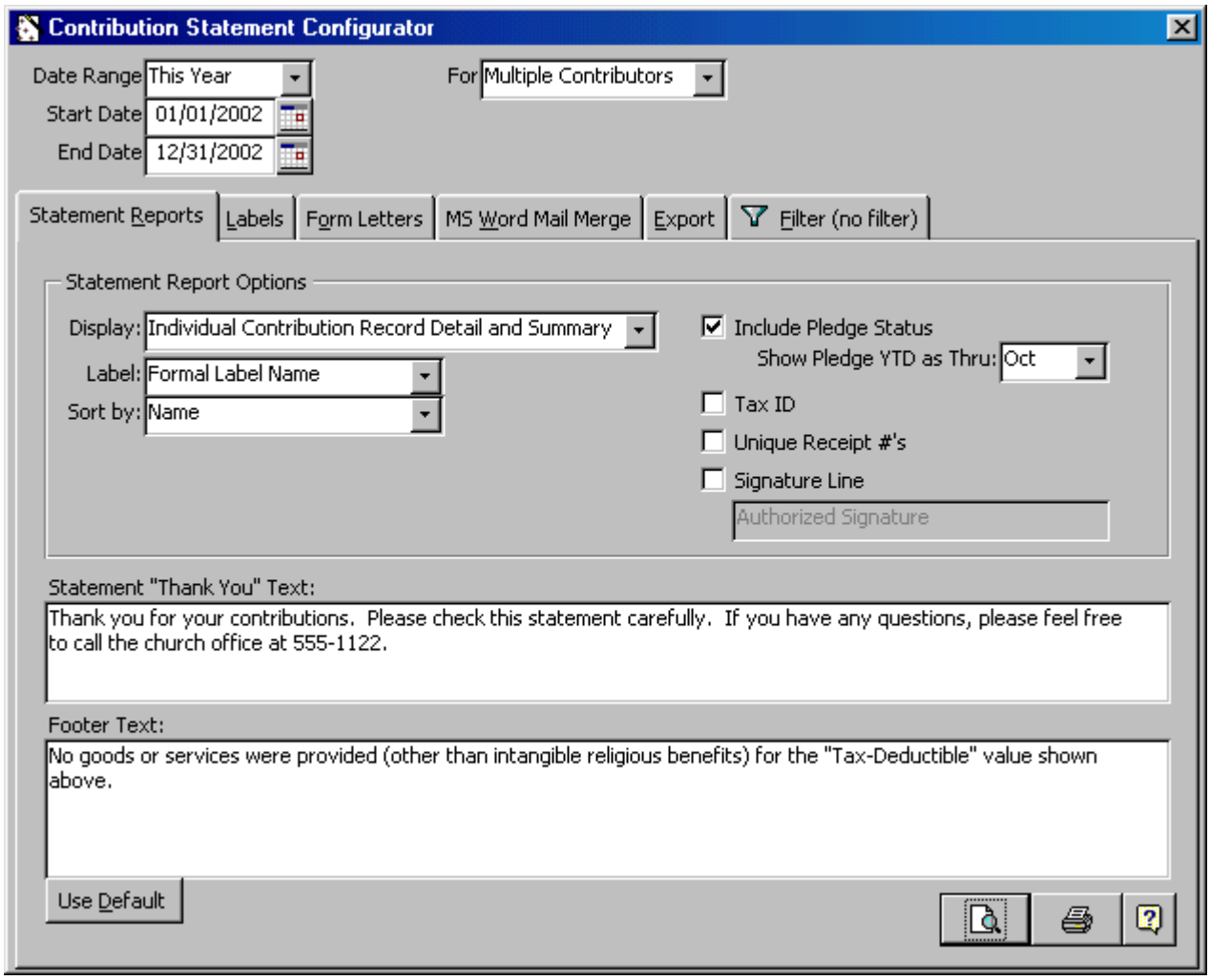
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a detailed receipt for a single contribution. Report is intended to be given to contributor to use for their income tax return purposes.

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13.13.5 Contribution Statement Configurator

(Chapter 13 - Reporting & Other Output Options)


Contribution Statement Configurator
Date Range This Year
Start Date 01/01/2002
End Date 12/31/2002
For Multiple Contributors
Statement Reports
Labels
Form Letters
MS Word Mail Merge
Export
Filter (no filter)
Statement Report Options
Display: Individual Contribution Record Detail and Summary
Label: Formal Label Name
Sort by: Name
Include Pledge Status
Show Pledge YTD as Thru: Oct
Tax ID
Unique Receipt #'s
Signature Line
Authorized Signature
Statement "Thank You" Text:
Thank you for your contributions. Please check this statement carefully. If you have any questions, please feel free to call the church office at 555-1122.
Footer Text:
No goods or services were provided (other than intangible religious benefits) for the "Tax-Deductible" value shown above.
Use Default

BASED ON: Contribution records

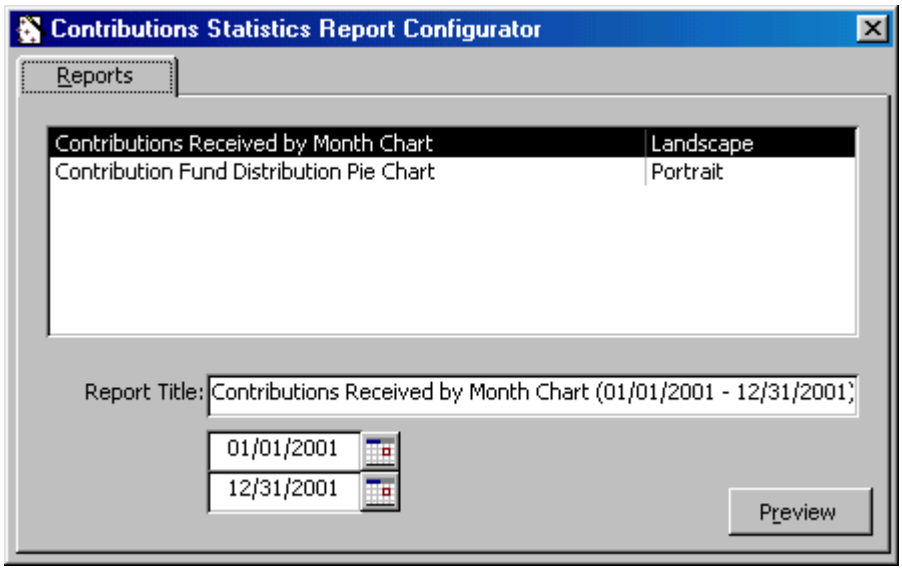
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate desired output for contributors who have contributed during a specified date range. Can be run on all contributors or on a sub-set.

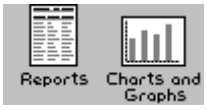
(c) Copyright 2001 Helpmate Technology Solutions

13.13.6 Contribution Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contribution records

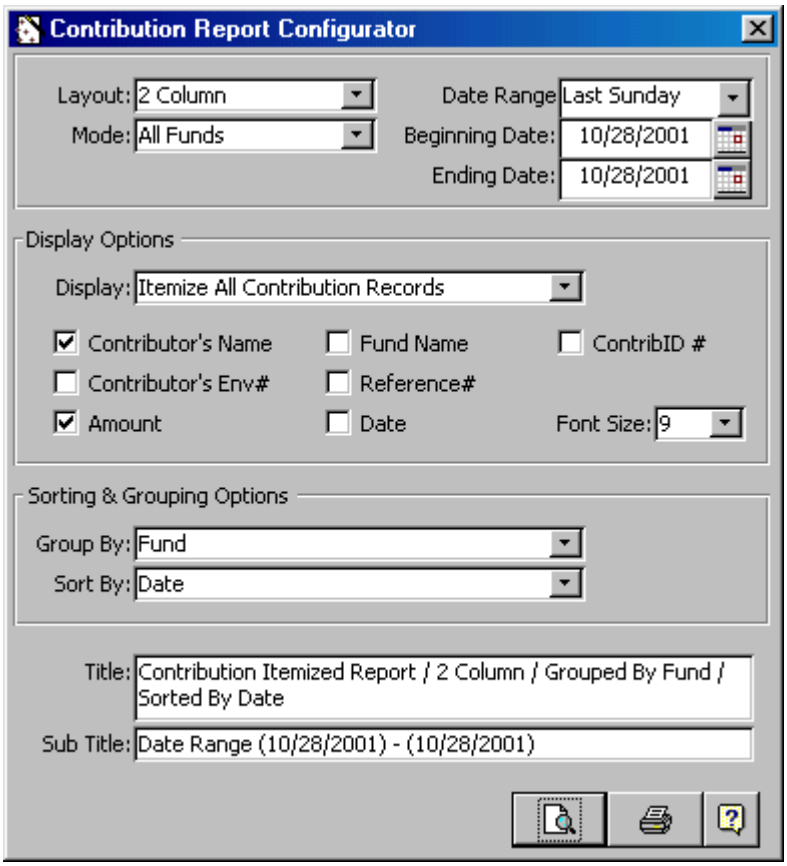
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate several statistical-type contribution and pledge based reports such as bar graphs displaying contributions received.

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13.13.7 Contributions Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contribution records

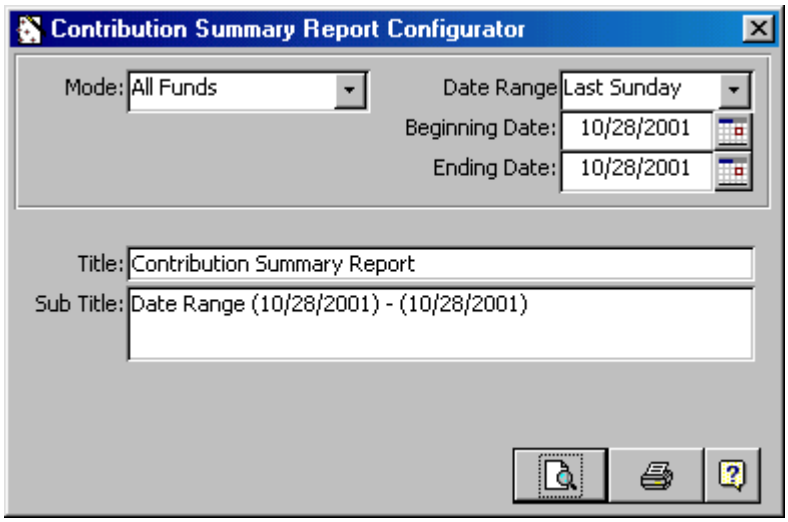
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a printed report of all contributions received within a specified date range. Can include all funds or only a specified fund.

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13.13.8 Contributions Summary Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Contribution records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a summary report of contributions received within a specified date range. Can include all funds or only a specified fund.

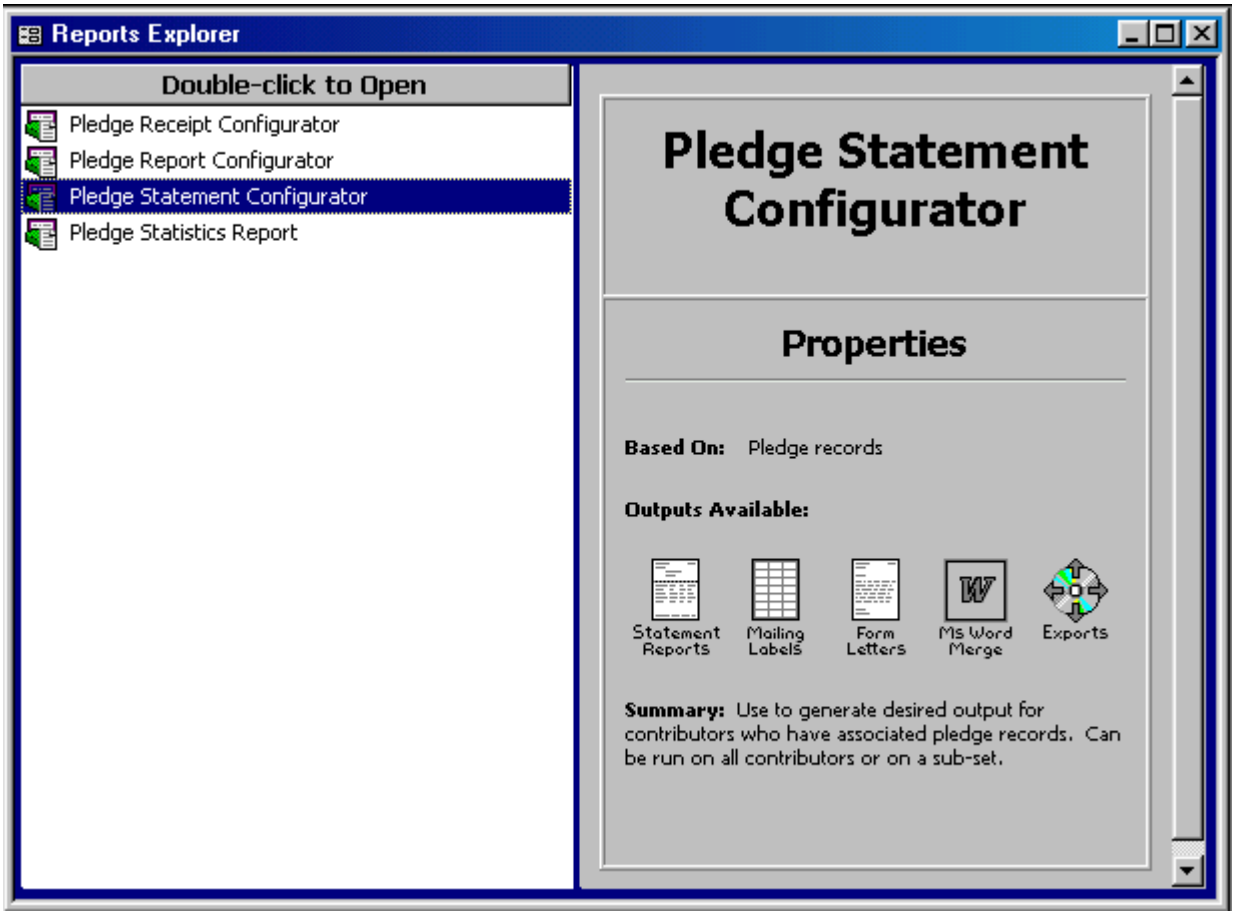
(c) Copyright 2001 Helpmate Technology Solutions

13.14 Pledge-based Outputs

13.14.1 Pledge-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Pledge-based output options are provided by the Pledge-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Pledge Reports" from the Navigation Menu or from the top main menubar.



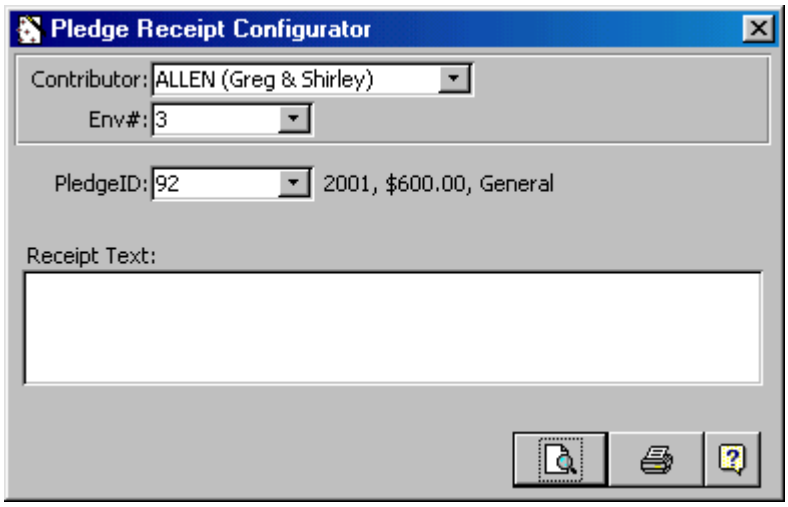
The following Pledge-based report configurators are provided:

- Pledge Receipt Configurator
- Pledge Report Configurator
- Pledge Statement Configurator
- Pledge Statistics Report Configurator

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13.14.2 Pledge Receipt Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Pledge records

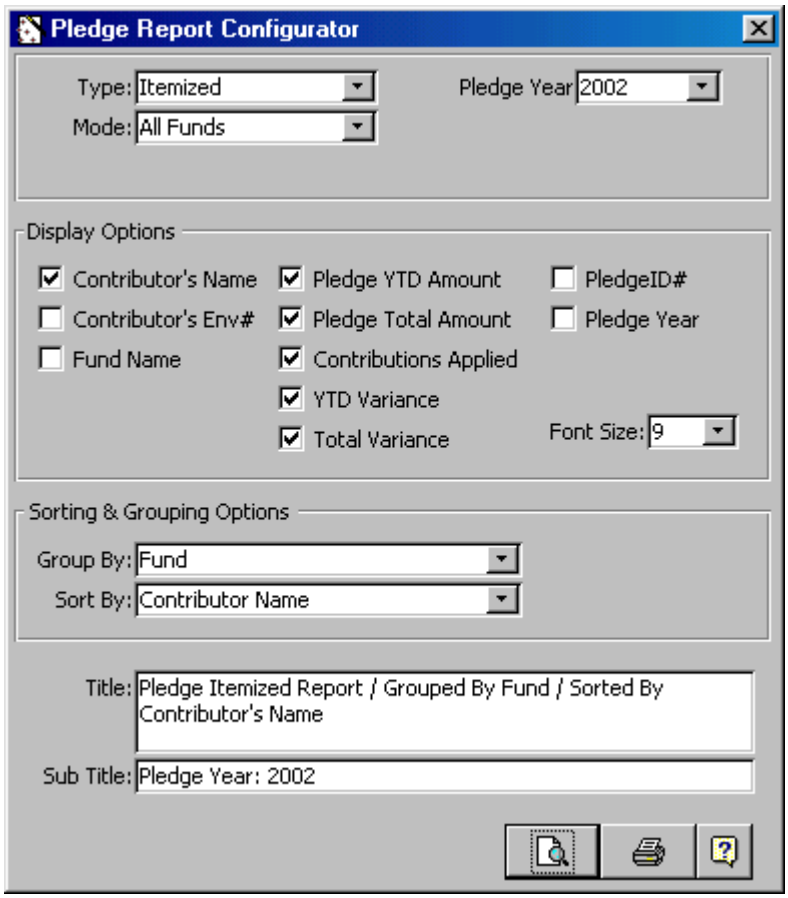
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a detailed receipt for a single pledge. Report is intended to be given to contributors for their record keeping purposes.

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13.14.3 Pledge Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Pledge records

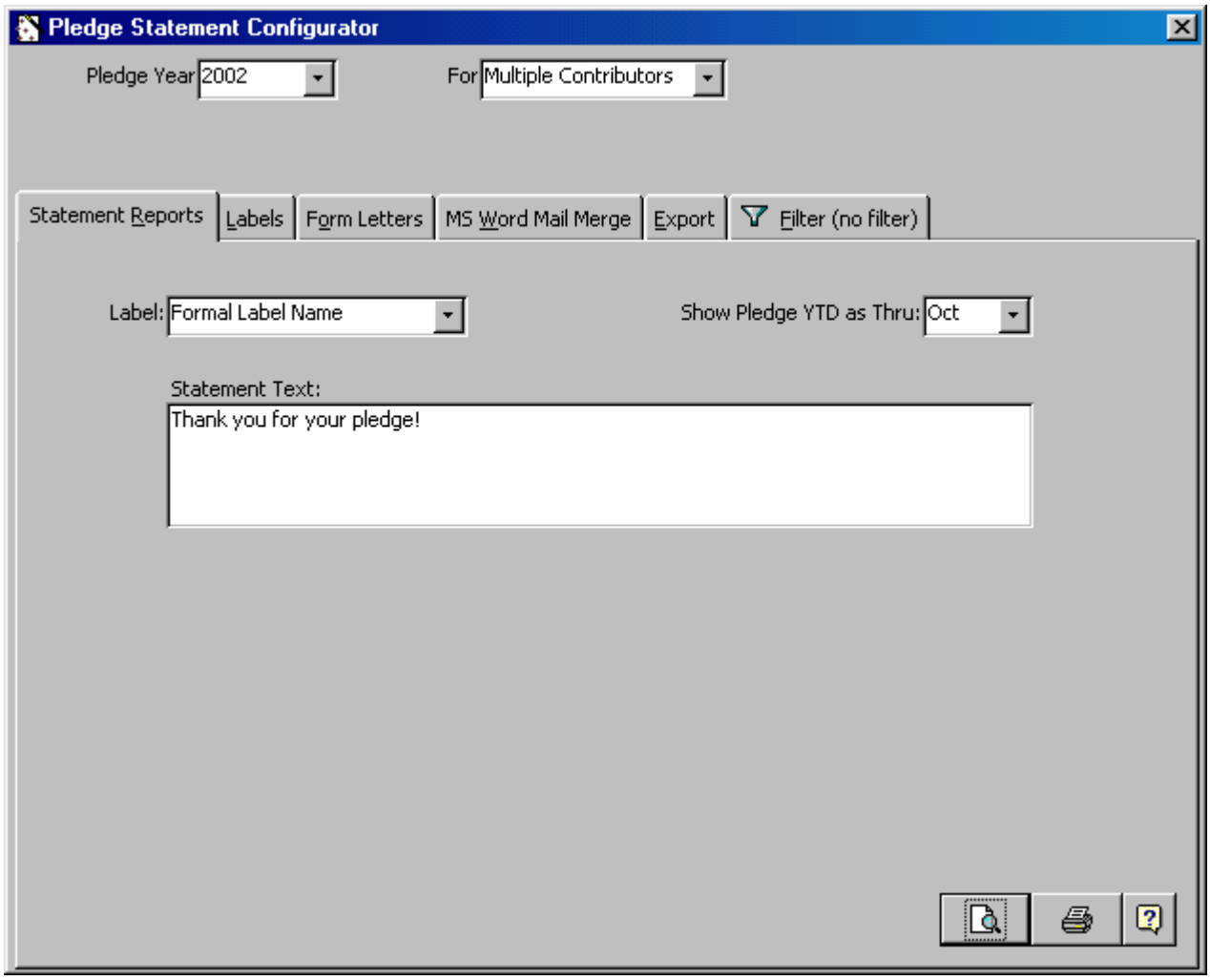
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a printed report of all pledge records for the specified year. Can include all funds or only a specified fund. Can include information on contributions applied and variances.

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13.14.4 Pledge Statement Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Pledge records

OUTPUT OPTIONS:

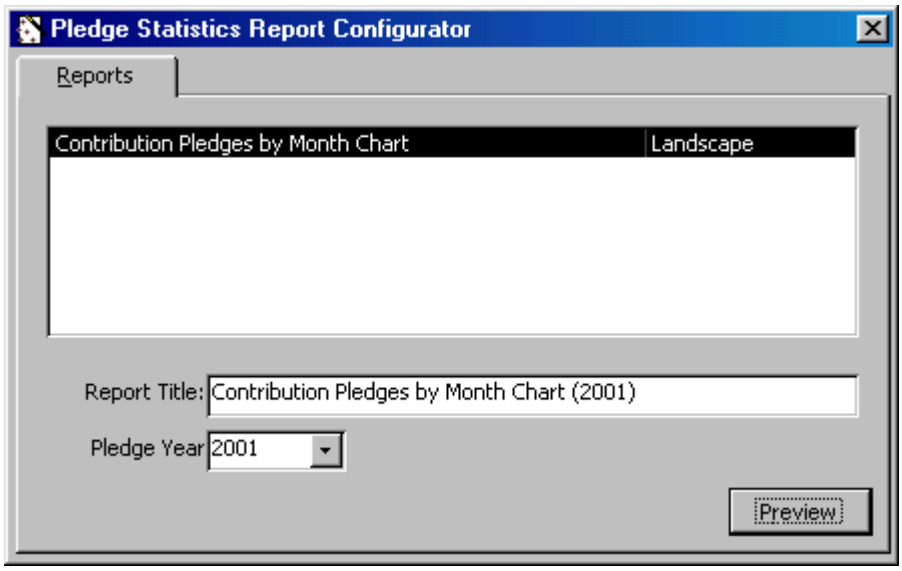


GENERAL DESCRIPTION: Used to generate desired output for contributors who have pledge records for the year(s) specified by the user.

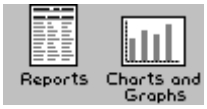
(c) Copyright 2001 Helpmate Technology Solutions

13.14.5 Pledge Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Pledge records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate statistical-type pledge based reports such as bar graphs displaying pledges received.

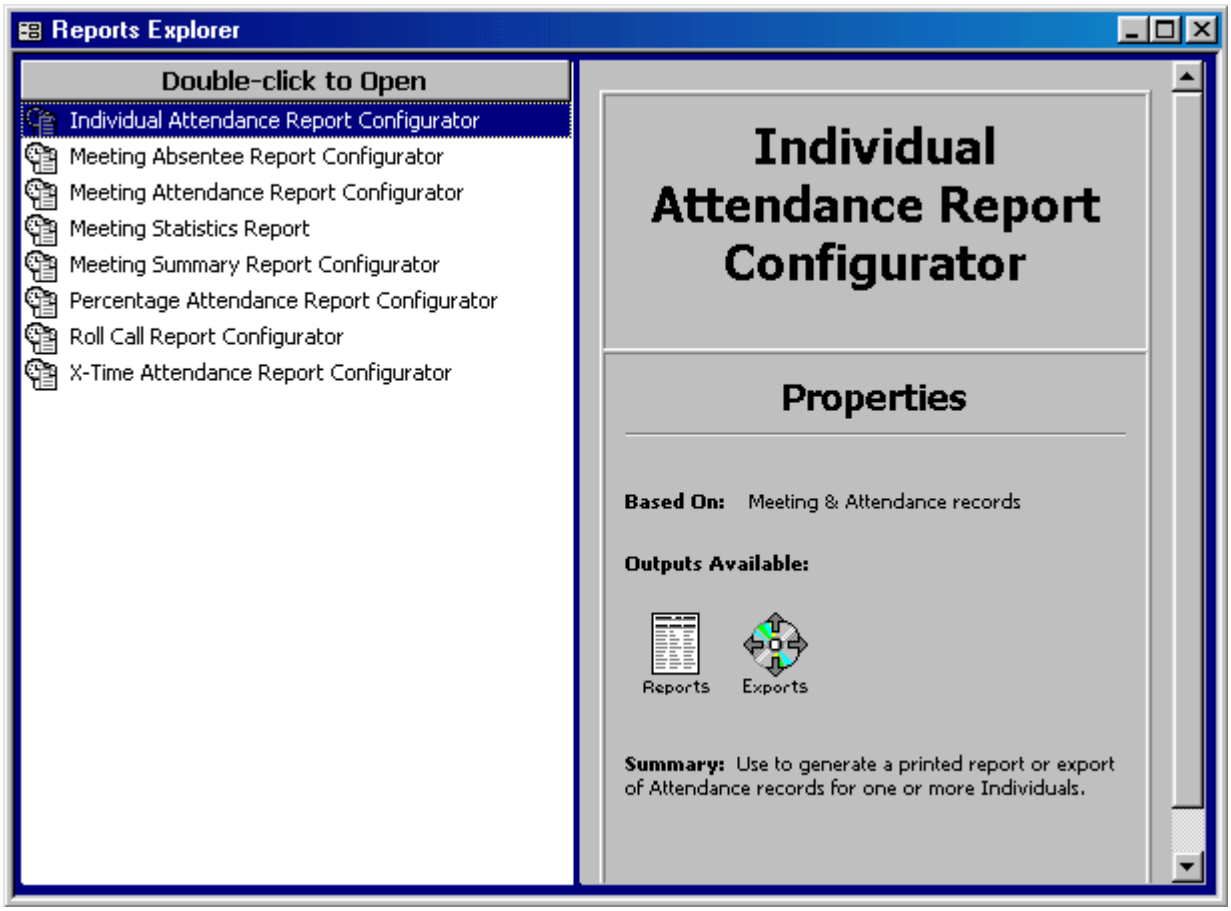
(c) Copyright 2001 Helpmate Technology Solutions

13.15 Meeting & Attendance-based Outputs

13.15.1 Meeting & Attendance-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Meeting & Attendance-based output options are provided by the Meeting & Attendance-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Meeting Reports" from the Navigation Menu or from the top main menubar.


Reports Explorer
Double-click to Open
Individual Attendance Report Configurator
Meeting Absentee Report Configurator
Meeting Attendance Report Configurator
Meeting Statistics Report
Meeting Summary Report Configurator
Percentage Attendance Report Configurator
Roll Call Report Configurator
X-Time Attendance Report Configurator
Individual Attendance Report Configurator
Properties
Based On: Meeting & Attendance records
Outputs Available:
Reports
Exports
Summary: Use to generate a printed report or export of Attendance records for one or more Individuals.

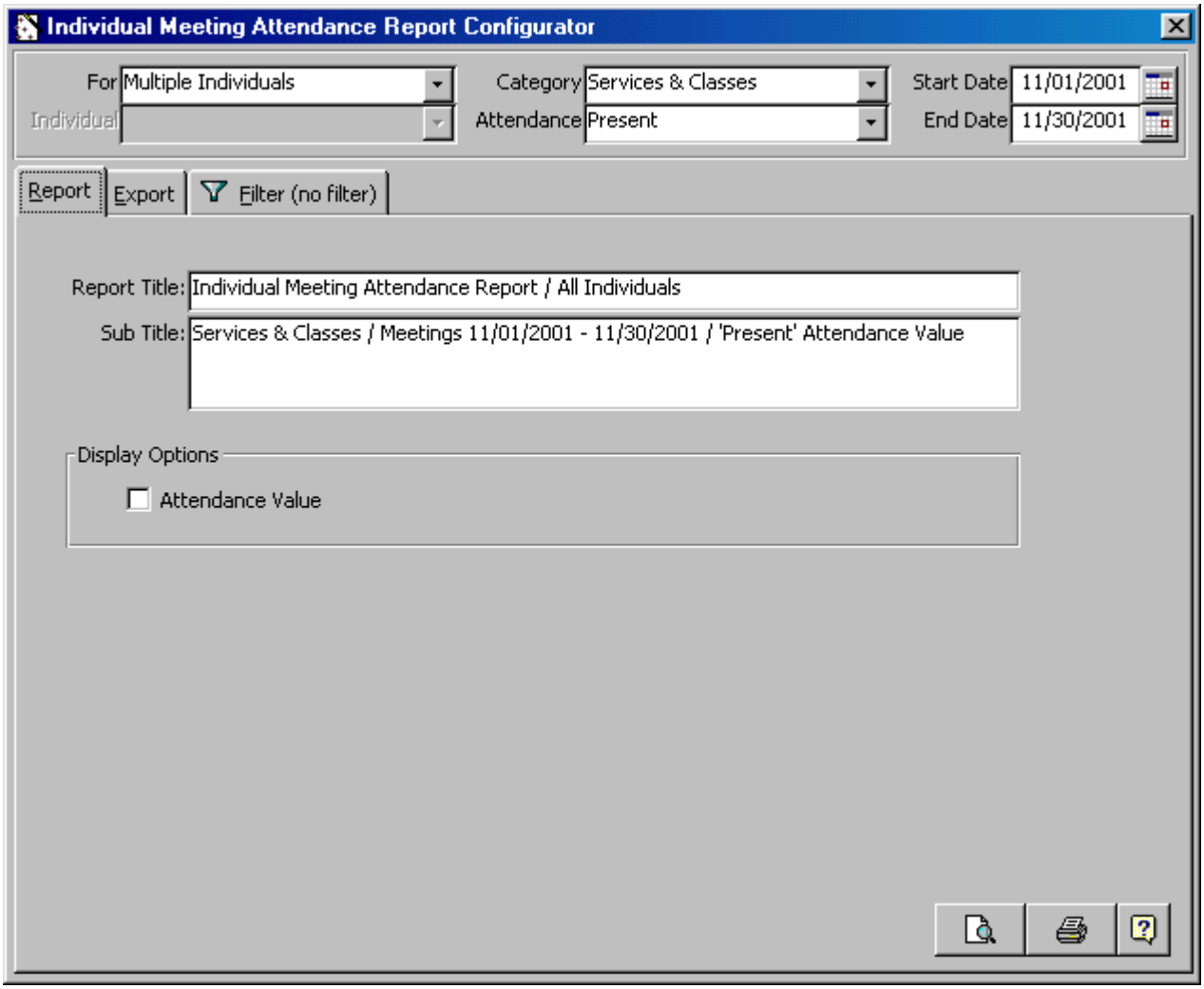
The following Meeting & Attendance-based report configurators are provided:

- Individual Attendance Report Configurator
- Meeting Absentee Report Configurator
- Meeting Attendance Report Configurator
- Meeting Statistics Report Configurator
- Meeting Summary Report Configurator
- Percentage Attendance Report Configurator
- Roll Call Report Configurator
- X-Time Attendance Report Configurator

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13.15.2 Individual Attendance Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Attendance records

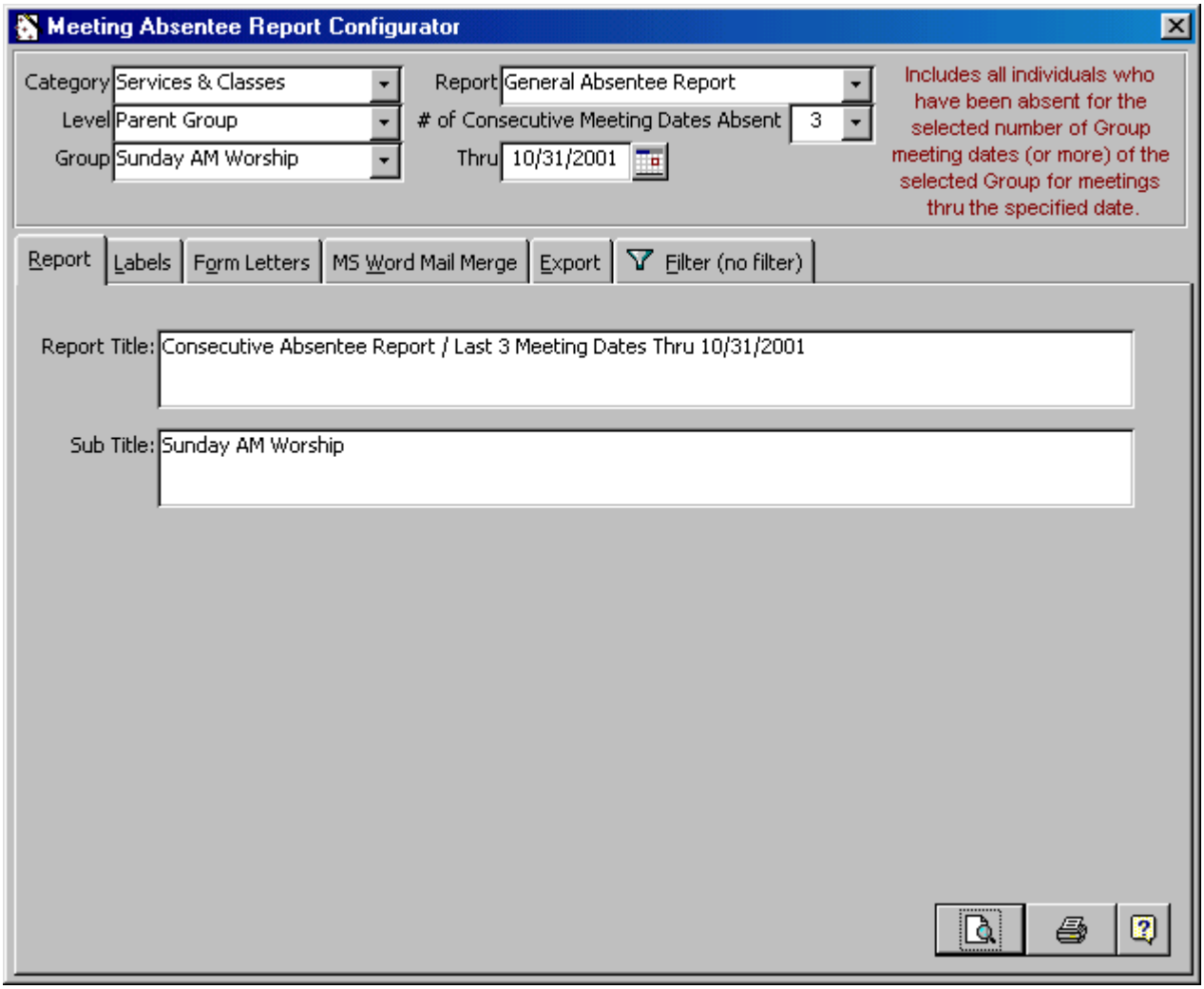
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a printed report or export of Attendance records for one or more Individuals.

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13.15.3 Meeting Absentee Report Configurator

(Chapter 13 - Reporting & Other Output Options)


Meeting Absentee Report Configurator
Category Services & Classes
Level Parent Group
Group Sunday AM Worship
Report General Absentee Report
of Consecutive Meeting Dates Absent 3
Thru 10/31/2001
Includes all individuals who have been absent for the selected number of Group meeting dates (or more) of the selected Group for meetings thru the specified date.
Report
Labels
Form Letters
MS Word Mail Merge
Export
Filter (no filter)
Report Title: Consecutive Absentee Report / Last 3 Meeting Dates Thru 10/31/2001
Sub Title: Sunday AM Worship

BASED ON: Attendance records

OUTPUT OPTIONS:

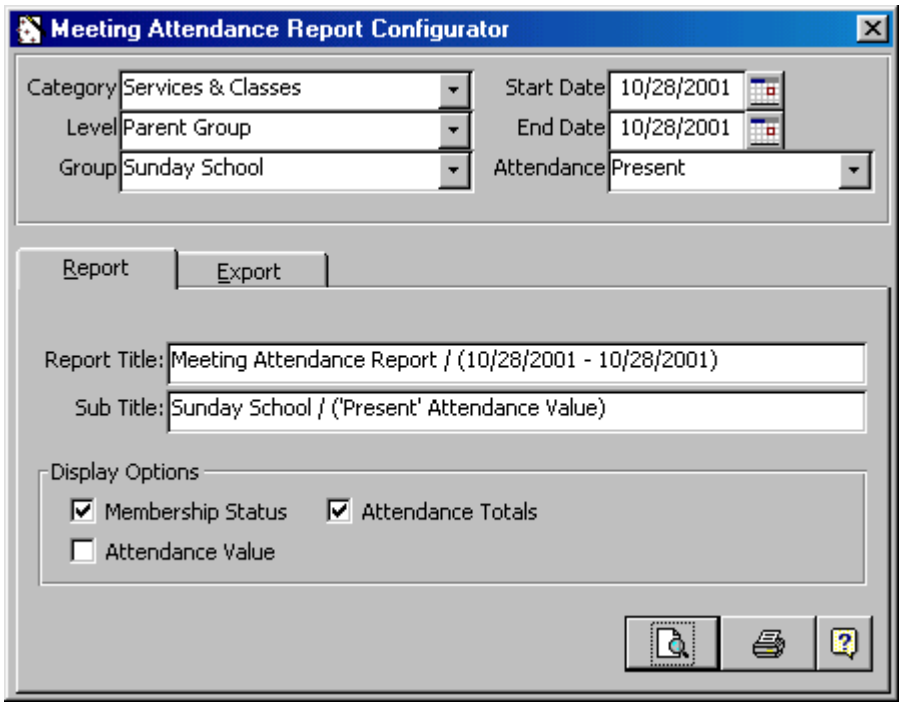


GENERAL DESCRIPTION: Use to generate desired output for Individuals who have been absent at a specified number of consecutive Meetings.

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13.15.4 Meeting Attendance Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Attendance records

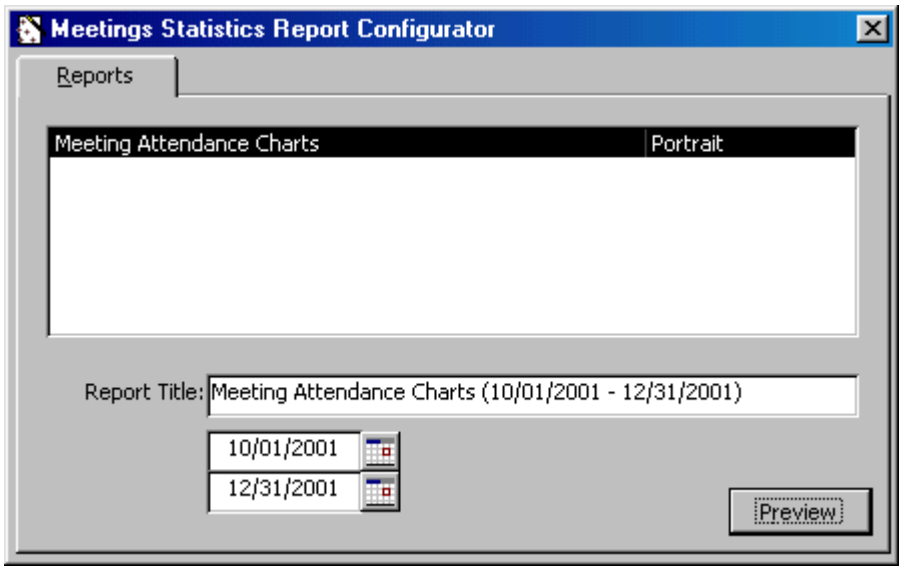
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a printed detail report or export of Attendance records for 1 or more Meeting records. Report can be run for all Group category Meetings or only on a specific Group's Meetings.

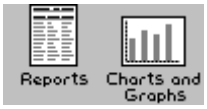
(c) Copyright 2001 Helpmate Technology Solutions

13.15.5 Meeting Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Attendance records

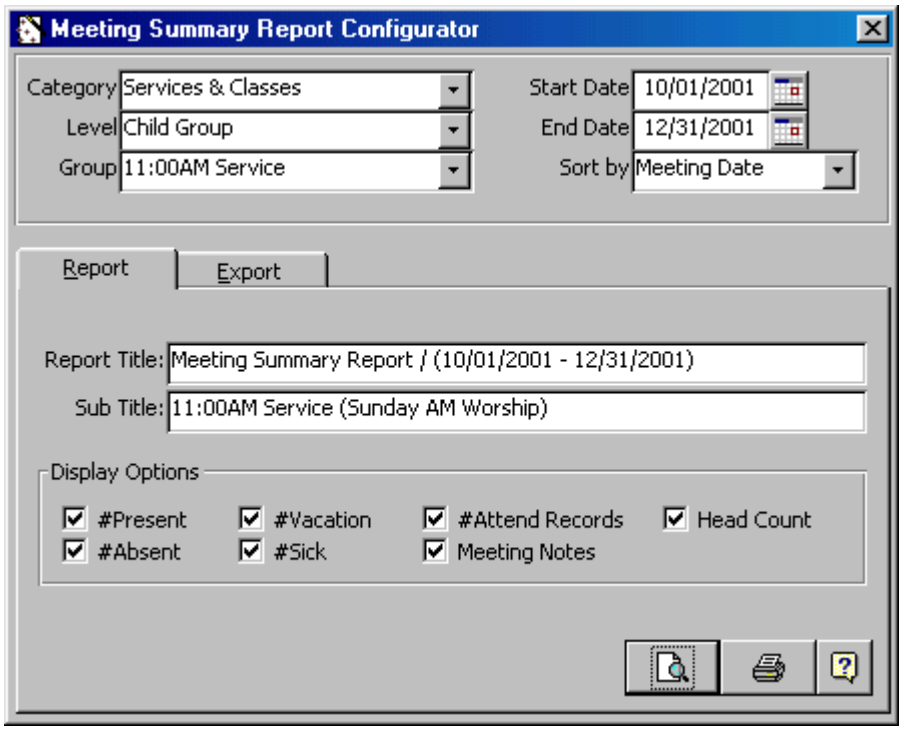
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate Attendance summary reports/charts which display number of attendances/absentees per month and more.

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13.15.6 Meeting Summary Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Attendance records

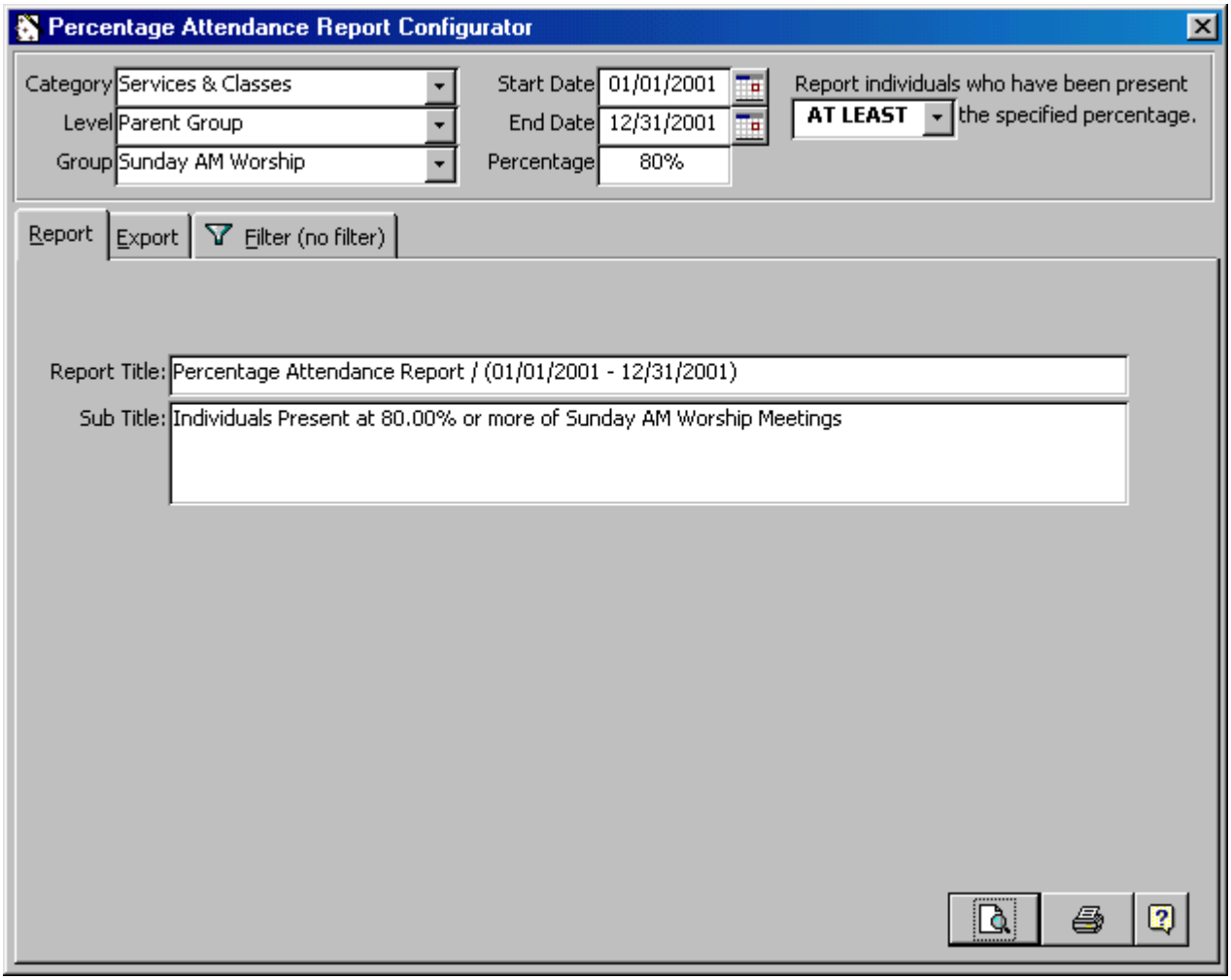
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a printed summary report or export of Attendance data totals (total number of present, absent, etc.) for one or more Meeting records.

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13.15.7 Percentage Attendance Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Attendance records

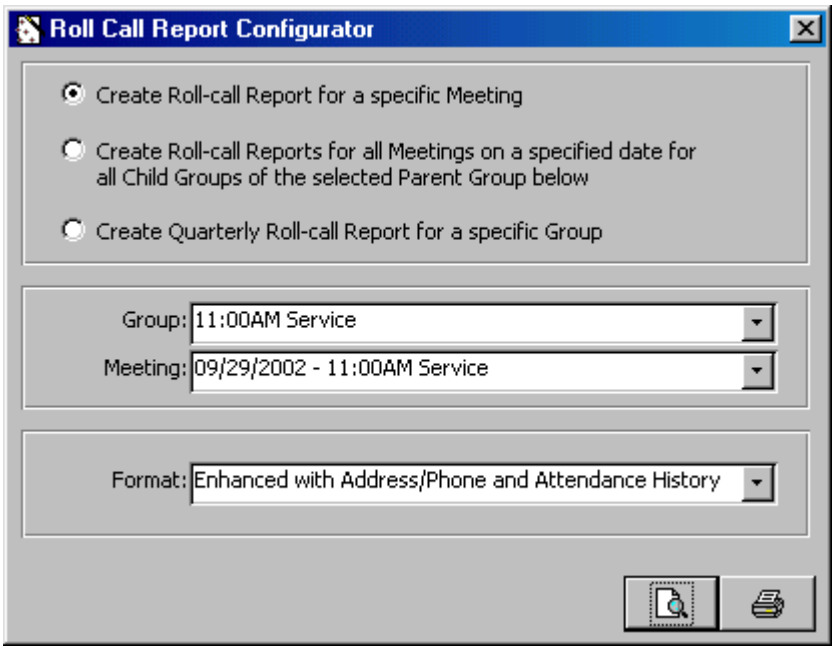
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a report listing or export of Individuals who have attended more or less than a user-specified percentage of meetings within a user-specified date range.

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13.15.8 Roll Call Report Configurator

(Chapter 13 - Reporting & Other Output Options)


Roll Call Report Configurator
Create Roll-call Report for a specific Meeting
Create Roll-call Reports for all Meetings on a specified date for all Child Groups of the selected Parent Group below
Create Quarterly Roll-call Report for a specific Group
Group: 11:00AM Service
Meeting: 09/29/2002 - 11:00AM Service
Format: Enhanced with Address/Phone and Attendance History

BASED ON: Attendance records

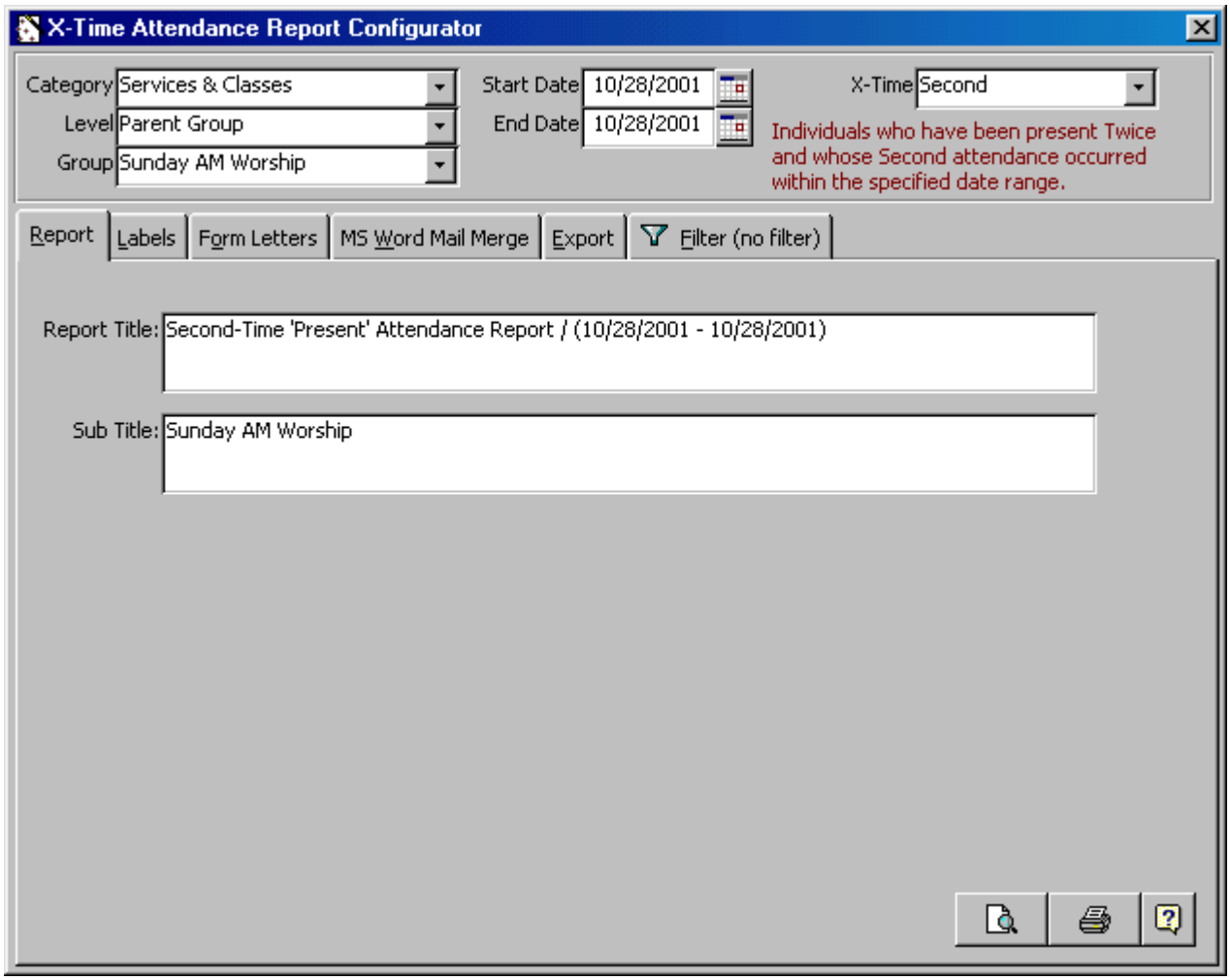
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a "roll-call" report for a specific Group Meeting. Report includes all possible meeting attendees and provides place to mark attendance. Enhanced format option provides address & phone info as well as recent attendance history info. A Quarterly report is also available for printing 1 report for 13 weeks worth of attendance data.

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13.15.9 X-Time Attendance Report Configurator

(Chapter 13 - Reporting & Other Output Options)


X-Time Attendance Report Configurator
Category Services & Classes
Level Parent Group
Group Sunday AM Worship
Start Date 10/28/2001
End Date 10/28/2001
X-Time Second
Individuals who have been present Twice and whose Second attendance occurred within the specified date range.
Report
Labels
Form Letters
MS Word Mail Merge
Export
Filter (no filter)
Report Title: Second-Time 'Present' Attendance Report / (10/28/2001 - 10/28/2001)
Sub Title: Sunday AM Worship

BASED ON: Attendance records

OUTPUT OPTIONS:



GENERAL DESCRIPTION: Use to generate desired output for Individuals based on their X-time attendance. For example, you can generate a report, mailing labels, form letters, etc. to include all Individuals whose 2nd visit occurred at last Sunday's 9:00am service meeting (we've specified X=2 in this example).

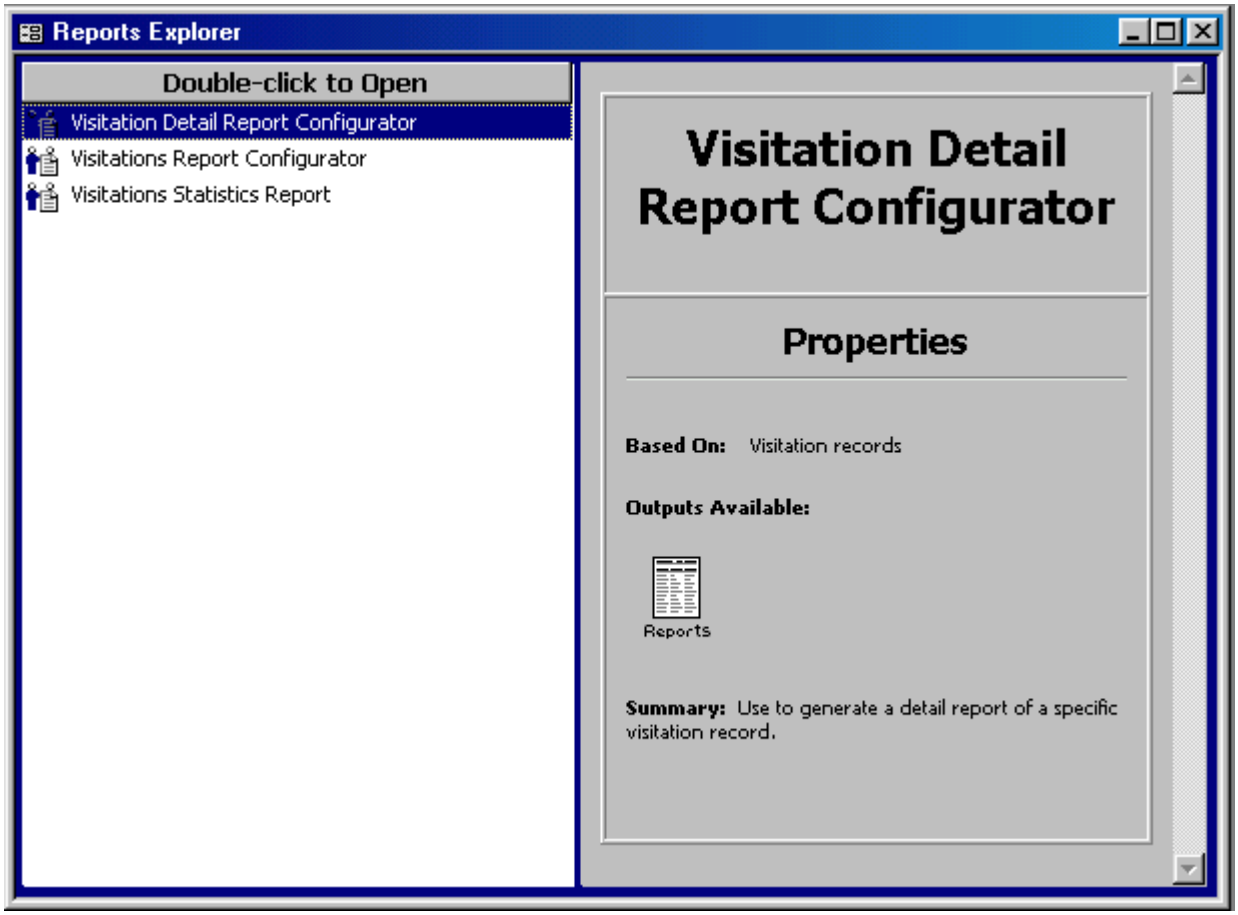
(c) Copyright 2001 Helpmate Technology Solutions

13.16 Visitation-based Outputs

13.16.1 Visitation-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Visitation-based output options are provided by the Visitation-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Visitation Reports" from the Navigation Menu or from the top main menubar.



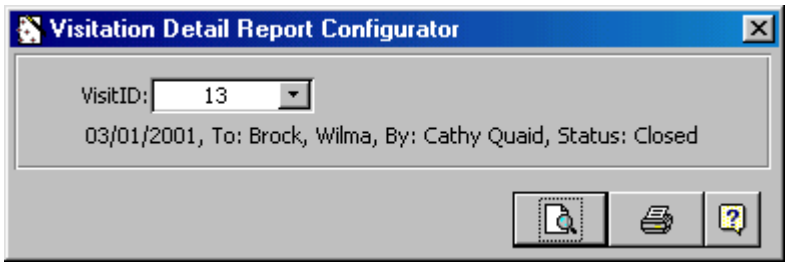
The following Visitation-based report configurators are provided:

- Visitation Detail Report Configurator
- Visitations Report Configurator
- Visitations Statistics Report Configurator

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13.16.2 Visitation Detail Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Visitation records

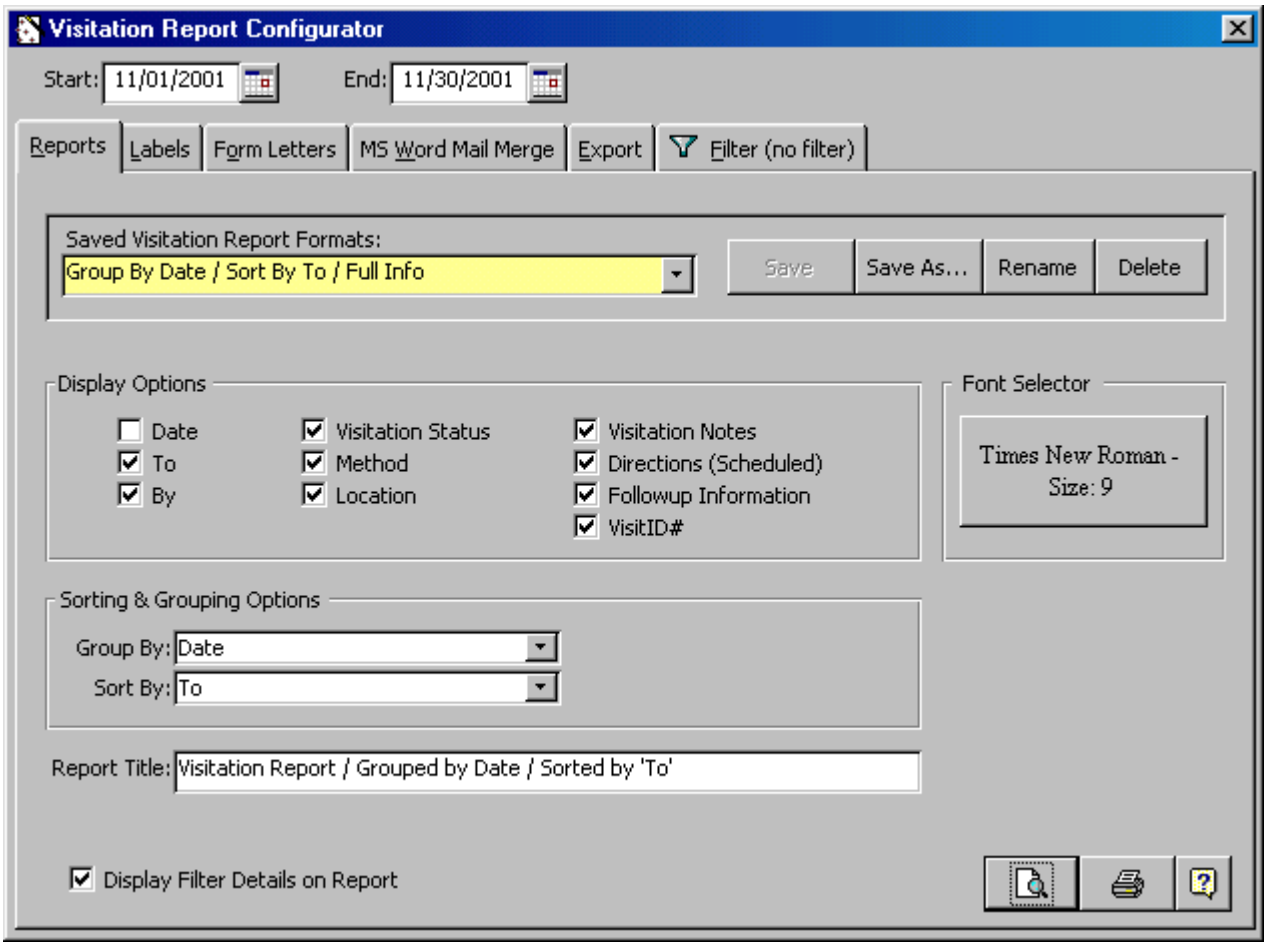
OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a detail report of a specific visitation record.

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13.16.3 Visitations Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Visitation records

OUTPUT OPTIONS:

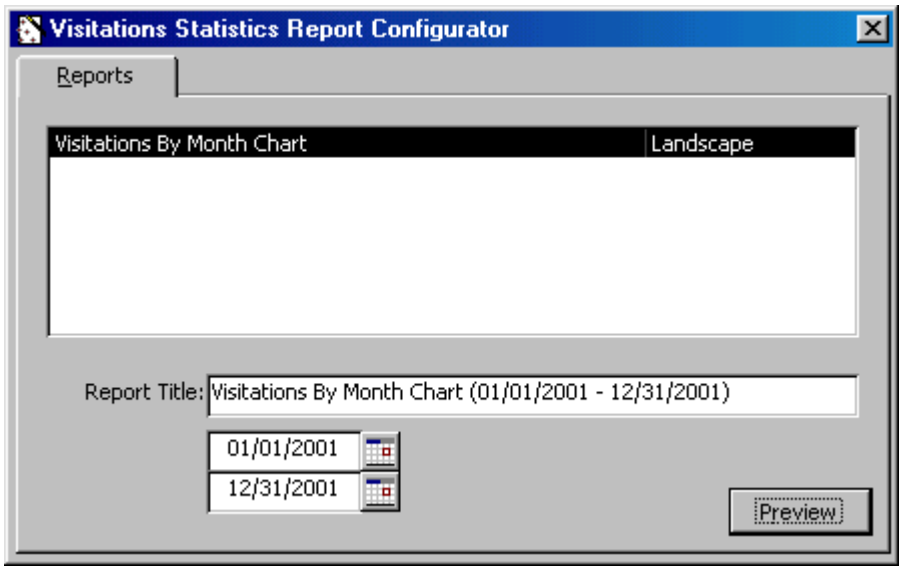


GENERAL DESCRIPTION: Use to generate desired output for visitation records. Call include all or a sub-set of visitation records.

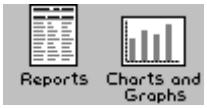
(c) Copyright 2001 Helpmate Technology Solutions

13.16.4 Visitations Statistics Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Visitation records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate statistical-type visitation based reports such as bar graph displaying the number of visitations performed by month within a specified date range.

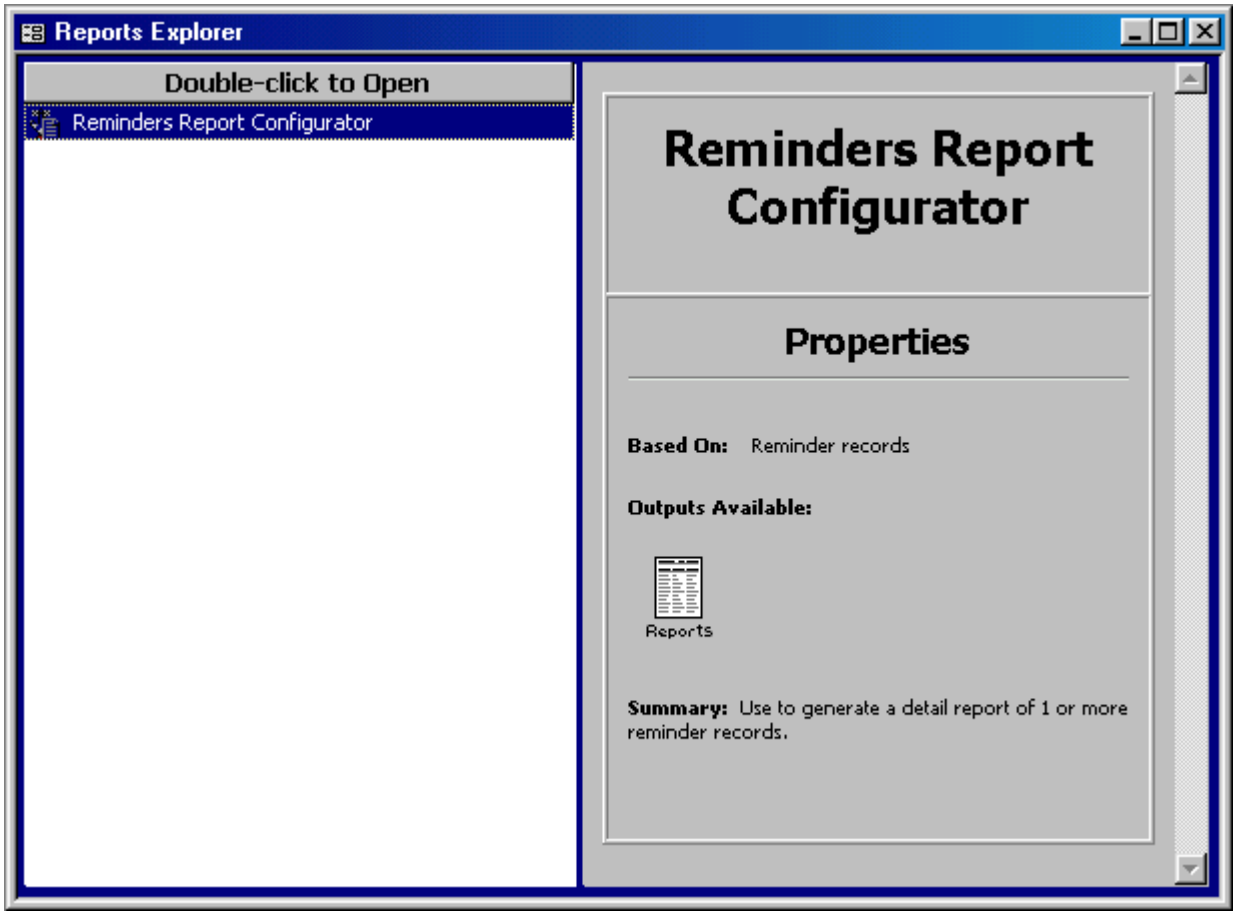
(c) Copyright 2001 Helpmate Technology Solutions

13.17 Reminder-based Outputs

13.17.1 Reminder-based Outputs

(Chapter 13 - Reporting & Other Output Options)

The Reminder-based output options are provided by the Reminder-based report configurators. These report configurators are available from the Reports Explorer by selecting "Reports | Reminder Reports" from the Navigation Menu or from the top main menubar.



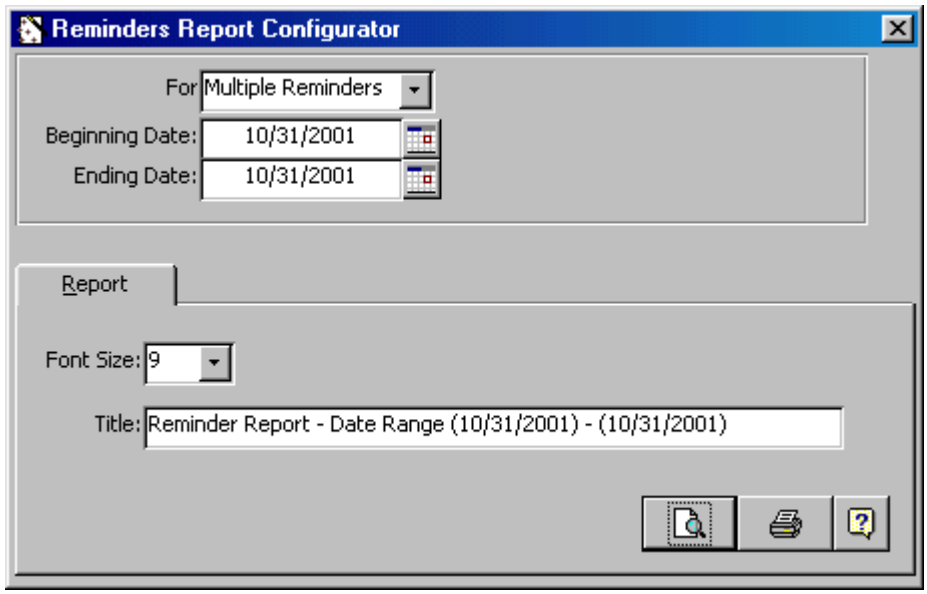
The following Reminder-based report configurators are provided:

- Reminders Report Configurator

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13.17.2 Reminders Report Configurator

(Chapter 13 - Reporting & Other Output Options)



BASED ON: Reminder records

OUTPUT OPTIONS: 

GENERAL DESCRIPTION: Use to generate a detail report of 1 or more reminder records.

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Chapter 14

14 Chapter 14 - Tools

14.1 Chapter 14 - Tools

Chapter 14 Sections:

- Flag Wizard
- Bulk Email Wizard
- Calendar Creator
- Custom Filter Builder
- Grade Auto-Promotor
- Contribution Transfer Wizard
- Envelope# Auto-Assign
- Palm Pilot Export Utility
- Custom Report Generator
- Database Repair Utility

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14.2 Flag Wizard

(Chapter 13 - Tools)

To reach the Flag Wizard, select "Tools | Flag Wizard" from either the Navigation Menu or the main menubar.

The Flag Wizard enables you to easily set the Flag for multiple Household, Individual, and Contact records. It also provides a quick and easy way to unflag these records as well.


Flag Wizard
Flag Wizard
Households
Individuals
Contacts
To automatically flag a group of Household records, select (using the "Select Filter" button) the appropriate filter to include the desired subset of Household records and then click the "Flag" button. To unflag all Household records, click the "Unflag all Households" button.
Selected Filter Name:
Members and Regulars
Select Filter
Flag
Unflag all Households
Close

The Flag Wizard form is divided into 3 Tabs - "Households", "Individuals", and "Contacts". Each of these tabs allow the user to manipulate the Flag status of their respective set of records. Otherwise the elements and functionality on the 3 tabs are identical.

To Flag records using the Flag Wizard:

1. Select 1 of the 3 tabs depending on which type of records you are interested in flagging (Households, Individuals, or Contacts).
2. Use the "Select Filter" tab to activate the Custom Filter form and select the desired filter. The filter you choose here should be a filter that includes the desired records to be flagged by the Flag Wizard. If such a filter does not currently exist, you can create a new filter using the Custom Filter form.
3. Once a filter has been selected, you will be returned to the Flag Wizard form. Click the "Flag" button to flag all records meeting the selected filter's criteria.

To Un-Flag records using the Flag Wizard:

1. Select 1 of the 3 tabs depending on which type of records you are interested in un-flagging (Households, Individuals, or Contacts).
2. Use the "Unflag all Households" button to unflag the records (button will either read "Unflag all Households", "Unflag all Individuals", or "Unflag all Contacts" depending on which tab is active).

TIP: Flagged records will be identified with a small red flag in both the Detail View and Explorer Views. The meaning of the flagged status is for the user to determine. It can be utilized in many ways. For example, a flagged individual may be someone who is going through some significant hardships and requires special attention. Or it could designate core members of the congregation. There are, no doubt, many more ways of utilizing the flag status.

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14.3 Bulk Email Wizard

(Chapter 13 - Tools)

To reach the Bulk Email Wizard, select "Tools | Bulk Email Wizard" from either the Navigation Menu or the main menubar.

The Bulk Email Wizard enables you to easily generate a "bulk" email message to multiple Households, Individuals, and Contacts. This Wizard consists of a 4 step process:

STEP 1: Household-based Email Addresses

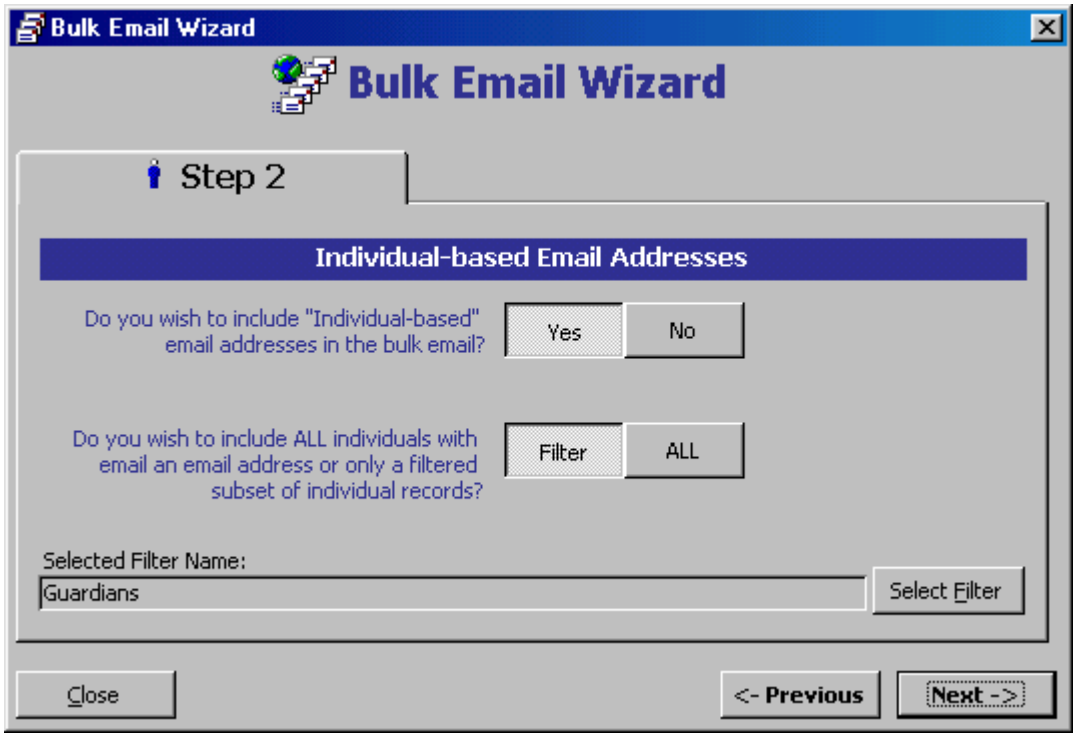
In this step, you can specify whether or not you'd like to include Household-based email addresses in the bulk email. If you choose "Yes", you have the option of either including ALL Household-based email addresses or you may select a Filter using the Custom Filter form to select a subset of Household-based email addresses. The screen-shot below shows an example of the "Members and Regulars" custom filter being applied. This will limit the bulk email to Household-based email addresses for Households which have a membership status of either "Member" or "Regular". The "Next" button will move the Wizard to Step 2.



STEP 2: Individual-based Email Addresses

In this step, you specify whether or not you'd like to include Individual-based email addresses in the bulk email. If you choose "Yes", you have the option of either including ALL Individual-based email addresses or you may select a Filter using the Custom Filter form to select a subset of Individual-based email addresses. The screen-shot below shows an example of the "Guardians" custom filter being applied. This will limit the bulk email to Individual-based email addresses for Guardian (adult) Individuals. The "Next" button will move the Wizard to Step 3.

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STEP 3: Contact-based Email Addresses

In this step, you specify whether or not you'd like to include Contact-based email addresses in the bulk email. If you choose "Yes", you have the option of either including ALL Contact-based email addresses or you may select a Filter using the Custom Filter form to select a subset of Contact-based email addresses. The screen-shot below shows an example of the "Contributor Contacts" custom filter being applied. This will limit the bulk email to Contact-based email addresses for Contributor-Type Contact records. The "Next" button will move the Wizard to Step 3.



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STEP 4: Generate

In this step, you'll use the "Generate" button to process the Bulk Email. As the form indicates, clicking the "Generate" button will first copy the desired set of Email addresses (determined by Steps 1-3) to the Windows Clipboard. Next, the computer's default Email program will be opened and a new (blank) Email message created.

You must then paste the Email addresses from the Windows Clipboard to your new Email message. To do so, simply place your cursor in the "To", "CC", or "BCC" line of your new Email message and then initiate the Windows "Paste" command by either:

- Pressing the <Ctrl><V> keyboard combination from your keyboard
- Selecting "Edit | Paste" from your Email software's top menubar


Bulk Email Wizard
Bulk Email Wizard
Step 4
Clicking on the "Generate" button below will:
1) Copy the desired set of Email addresses to the Windows Clipboard.
2) Activate your computer's default email program and open a new (blank) Email message.
To paste the copied Email addresses from the Windows Clipboard to your new email message, simply place your cursor in the "To", "CC", or "BCC" line of your new Email message and then initiate the Windows "Paste" command by either:
- Pressing <Ctrl + V> from your computer's keyboard
- Selecting "Edit | Paste" from your Email software's menubar.
Generate
Close
<- Previous
Next ->

TIP: If you would like to send a Bulk Email to all of the Individuals who are members of a CH2002 Group, you can use the Group Detail form's Email button in the form's toolbar section.

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14.4 Calendar Creator

(Chapter 13 - Tools)

To reach the Calendar Creator, select "Tools | Calendar Creator" from either the Navigation Menu or the main menubar.

The Calendar Creator enables you to easily generate graphical calendar reports displaying important dates such as birthdays, wedding anniversaries, visitation followups, etc.



GENERAL STEPS:

1. From the "Display" section of the form, choose from 4 options on which base the calendar display data:
   - Birthdays, Wedding Anniversaries, Scheduled Visitations, and Visitation Follow-ups

2. If desired, click the "Filter" button to specify an appropriate filter. For example, if you selected "Birthdays" in the previous step, but only want to include birthdays for individuals who have a membership Status of "Member", you could use the Filter button to choose the desired "Members" filter. If no filter were used, then ALL individuals in the database with a Birthday in the selected month would be included.

3. Use the controls at the top of the Calendar to set the desired month and year.

4. Click the "Generate Calendar Text" button to populate the Calendar with the selected calendar data.

5. Click the "Print" button to print the Calendar.

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14.5 Custom Filter Builder

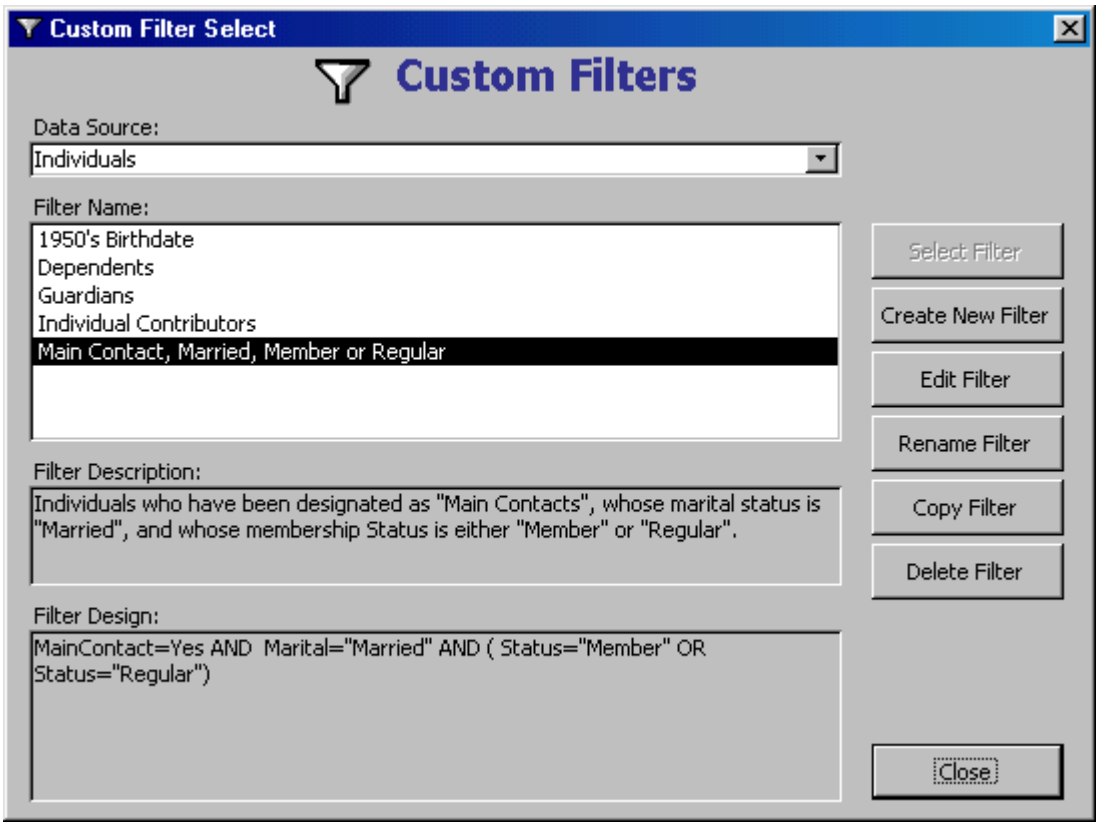
(Chapter 13 - Tools)

To reach the Custom Filter Builder, select "Tools | Custom Filter Builder" from either the Navigation Menu or the main menubar. This Custom Filter Builder is also accessed by clicking on any of the "Filter" buttons which exist on various forms within the CH2002 program.

The Custom Filter Builder enables you to create, save, and reuse very powerful filters for your CH2002 data. Filters define a sub-set of records from the full set. For example, you could create a filter based on Individual records that results in a sub-set of Individual records with membership Status = "Visitor". Filtering does not modify any records. It simply limits the number of records included to only those meeting a criteria you specify. Filters can be utilized in report generation, Explorer views, and throughout the CH2002 program.

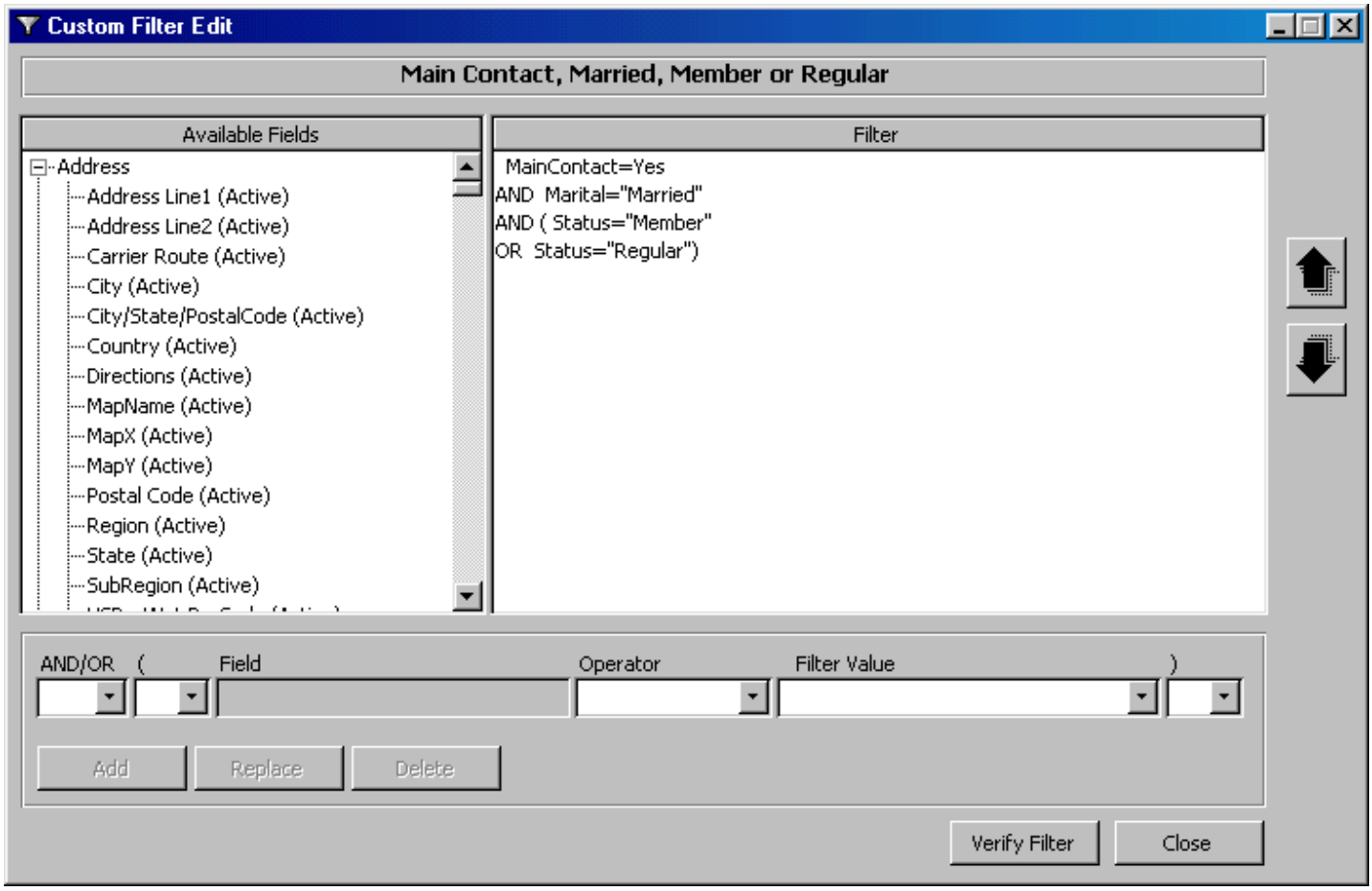
The initial screen of the Custom Filter Builder (shown below) enables you to select and manage your custom filters. Changing the "Data Source" value will display the available filters for the selected source in the ListBox control. The buttons on the right-hand side of the form enable you to edit, rename, copy, or delete the selected filter. You can use the "Create New Filter" to create a new custom filter.

If the Custom Filter screen was displayed by selecting one of the various "Filter" buttons found throughout the program, the "Select Filter" button will be enabled and would be used to select and apply the highlighted filter.



Clicking the "Edit Filter" button, will open the Custom Filter Edit form shown below.

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The upper portion of the Custom Filter Edit form consists of a TreeView control displaying all of the "Available Fields" from which to select from (on the left-hand side) and a ListView control displaying the current "Filter" criteria (on the right-hand side).

You'll use the left-hand "Available Fields" TreeView control to select and add desired fields to the filter's criteria. For example, if you want the filter to include the criteria of MainContact=Yes, then you'd click on "Main Contact" from the Available Fields TreeView control. Doing so will begin to populate the lower portion of the form where you can further specify the field's criteria design (using the "AND/OR", "(", "Operator", "Filter Value", and ")" controls). Clicking the "Add" button below these controls will add the criteria to the Filter and the criteria will be displayed as a line item in the Filter ListView control (on the right-hand side of the form). You can add as many criteria statements to your filter as desired. For example, the screen-shot above shows a filter with 4 criteria statements.

1. MainContact=Yes
2. AND Marital="Married"
3. AND (Status="Member"
4. OR Status="Regular")

It's important to utilize the parenthesis "(" and ")" to bracket the criteria statements logically the way you intend the filter to be interpreted.

Once a criteria statement has been added to the filter and is displayed in the "Filter" ListView control, you can edit the criteria statement by:

1. Selecting the desired criteria statement (by clicking with the left mouse button) from the "Filter" ListView control. Doing so will populate the bottom controls (ie. the "AND/OR", "(", "Operator", "Filter Value", and ")" controls) with the selected criteria statement.
2. Modifying the criteria statement as desired using the "AND/OR", "(", "Operator", "Filter Value", and ")" controls.

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3. Clicking the "Replace" button to apply the changes.

The process above could be used, for example, to edit our filter's 2nd criteria statement from:
AND Marital="Married" to AND Marital="Single"

The Up and Down arrow buttons on the right-hand side of the form enable you to re-order the criteria statements in the "Filter" ListBox control.

When the design of your filter is complete, you can use the "Verify Filter" button to have the program validate the design and let you know if there are any problems. The Close button will save the design and return you to the Custom Filter Select form.

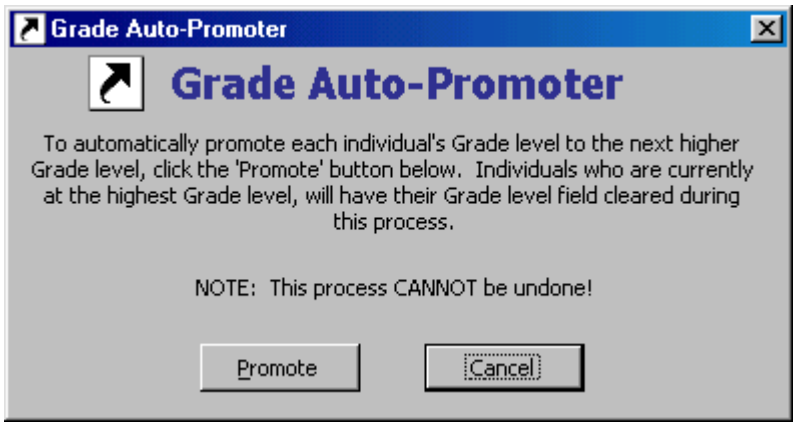
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14.6 Grade Auto-Promotor

(Chapter 13 - Tools)

To reach the Grade Auto-Promotor, select "Tools | Grade Auto-Promotor" from either the Navigation Menu or the main menubar.

The Grade Auto-Promotor enables you to automatically have the Grade Level values for your Individual records promoted (advanced) to the next highest level. You can use the Individuals Setup form to manage the various Grade Levels (ie. set the names and ordering of Grade Levels).


Grade Auto-Promoter
Grade Auto-Promoter
To automatically promote each individual's Grade level to the next higher Grade level, click the 'Promote' button below. Individuals who are currently at the highest Grade level, will have their Grade level field cleared during this process.
NOTE: This process CANNOT be undone!
Promote
Cancel

TIP: Individuals who are currently at the highest Grade Level, will have their Grade Level field cleared during this process.

TIP: The Auto-Promote process cannot be undone.

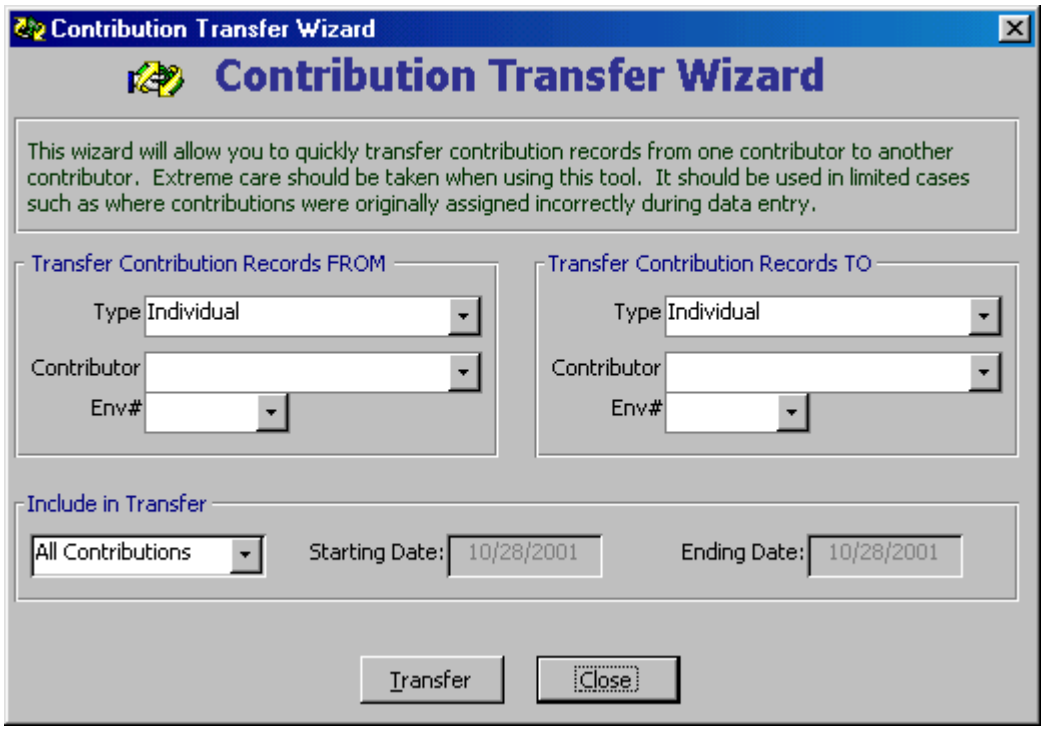
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14.7 Contribution Transfer Wizard

(Chapter 13 - Tools)

To reach the Contribution Transfer Wizard, select "Tools | Contribution Transfer Wizard" from either the Navigation Menu or the main menubar.

The Contribution Transfer Wizard is a tool which you can use to transfer multiple contribution records from one Household, Individual, or Contact to another. This tool should be used with extreme caution and should only be used in limited cases - for example when contributions were initially entered incorrectly.


Contribution Transfer Wizard
Contribution Transfer Wizard
This wizard will allow you to quickly transfer contribution records from one contributor to another contributor. Extreme care should be taken when using this tool. It should be used in limited cases such as where contributions were originally assigned incorrectly during data entry.
Transfer Contribution Records FROM
Type Individual
Contributor
Env#
Transfer Contribution Records TO
Type Individual
Contributor
Env#
Include in Transfer
All Contributions
Starting Date: 10/28/2001
Ending Date: 10/28/2001
Transfer
Close

To use this tool, select the desired "FROM" contributor (from the left-hand side of the form). Then, select the desired "TO" contributor. If necessary, select the desired Starting and Ending dates (or choose "All Contributions"). The "Transfer" button will transfer contributions from the "FROM" contributor to the "TO" contributor.

NOTE: Contribution transfers performed by the Contribution Transfer Wizard CANNOT be undone. Use this tool with caution.

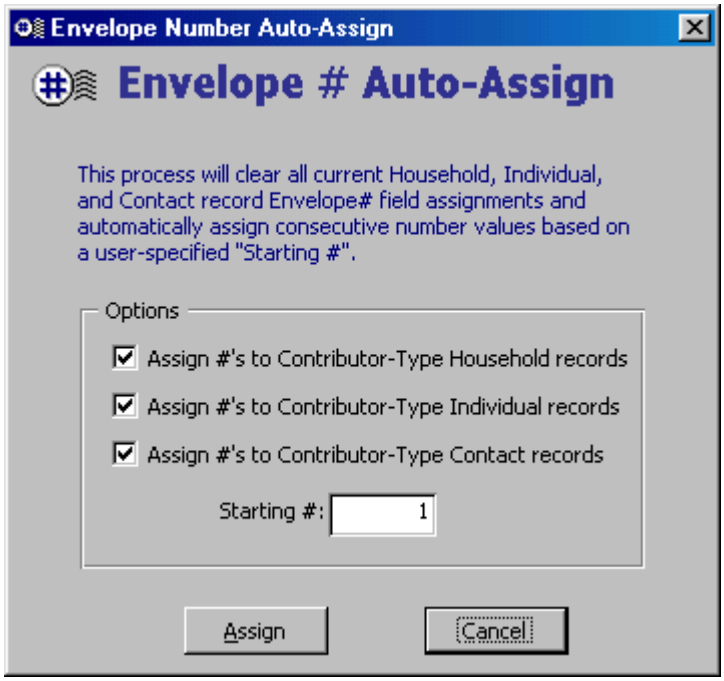
(c) Copyright 2001 Helpmate Technology Solutions

14.8 Envelope# Auto-Assign

(Chapter 13 - Tools)

To reach the Envelope# Auto-Assign tool, select "Tools | Envelope# Auto-Assign" from either the Navigation Menu or the main menubar.

This tool will enable you to have Household, Individual, and Contact based Envelope#'s automatically assigned.


Envelope Number Auto-Assign
Envelope # Auto-Assign
This process will clear all current Household, Individual, and Contact record Envelope# field assignments and automatically assign consecutive number values based on a user-specified "Starting #".
Options
Assign #'s to Contributor-Type Household records
Assign #'s to Contributor-Type Individual records
Assign #'s to Contributor-Type Contact records
Starting #:
1
Assign
Cancel

To use this tool, use the 3 checkboxes found in the "Options" section of the form to indicate whether or not Household, Individual, and/or Contact records should be included in the assignment. Only Contributor-Type records will be included in the assignment. Therefore, make certain that you have correctly setup each of your Household, Individual, and Contact records to indicate this.

The "Starting#" field allows you to specify a starting envelope number. The "Assign" button to perform the Envelope number assignments.

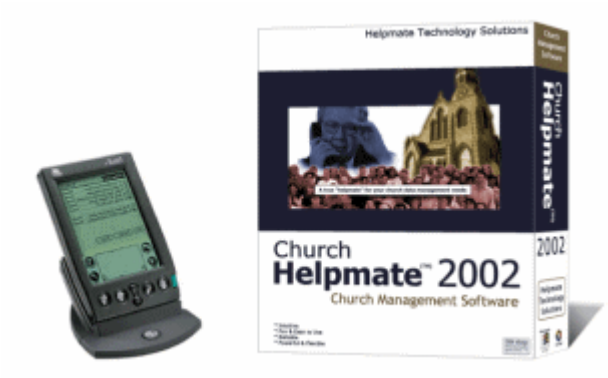
TIP: If necessary, you can modify the assignments made by this tool by editing the Env# field manually for the desired Household, Individual, or Contact record (through the appropriate Detail form).

TIP: The env# auto-assignment starts assigning env#'s consecutively beginning at the value indicated by the "Starting#" value.

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14.9 Palm Pilot Export Utility

(Chapter 13 - Tools)



Introduction:

As a pastor, administrator, or secretary, wouldn't it be wonderful if your Church Helpmate™ 2002 individual and contact records could be available to you at all times… no matter where you were, what time it was, or whether or not you had access to your computer? Now, with the Church Helpmate™ 2002 Palm Pilot Export Utility, this is a reality! If you haven't already heard, the "palm" or hand-held electronic industry is one of the fastest growing areas in today's high-tech world. Men and women of all ages and backgrounds are managing their often complex schedules and countless contacts with these convenient, low-cost hand-held devices.

At Helpmate Technology Solutions, we are always searching for ways to implement new technology to increase the efficiency and effectiveness of our church clients (it's our passion). As a result, we've developed the Church Helpmate™ 2002 Palm Pilot Export Utility to enable you and your church to transfer the individual and contact records from your CH2002 system to your Palm Pilot. Now, with CH2002 and your Palm Pilot, you'll have easy access to your church records 24 hours, 7 days a week!

Overview:

If you have existing address book entries in your Palm Pilot unit, there are a couple of steps which must be taken before using the Palm Pilot Export Utility. The following steps will enable you to maintain existing records in your Palm Pilot unit during the CH2002 Palm Pilot Export Utility's export process (otherwise they will be over-written):

1. In your Palm Pilot unit, place the existing Address records that you wish to maintain in one of the following Categories: "Unfiled", "Business", or "Personal".
2. Upload the contents of your Palm Pilot unit to the Palm Desktop software.

To open the CH2002 Palm Pilot Export Utility, select "Tools | Palm Pilot Export Utility" from the CH2002 Navigation Menu or from the main menubar. Alternately, you can start-up the Palm Pilot Export Utility by selecting its icon found under the Windows "Start" button ("Start | Programs | Church Helpmate 2002 | Palm Pilot Export Utility").

The CH2002 Palm Pilot Export Utility utilizes a "Wizard" to walk you through the 4-step export process:

Step 1: SETUP

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Palm Pilot Export Wizard
Step1 (Setup)
Overview
This Wizard will allow you to copy all or a specified subset of your Church Helpmate 2002 Individual and Contact records from the CH2002 data file to the Palm Desktop software's database. Once this Wizard has completed this process, you can then utilize the "Hot Sync" functionality between the Palm Desktop software and your Palm Pilot unit to get the CH2002 data into your unit.
IMPORTANT:
If you currently have existing Address records in your Palm Pilot that are not in the Church Helpmate 2002 database, the following steps will enable you to maintain these records in your Palm Pilot unit during the CH2002 Palm Pilot Export process (otherwise they will be over-written):
- In your unit, place the Address records that you wish to maintain in one of the following Categories: "Unfiled", "Business", or "Personal".
- Upload the contents of your unit to the Palm Desktop software before running the CH2002 Palm Pilot Export Utility.
Palm Pilot Configuration
Pilot Path:
User Name:
Change
Next ->>

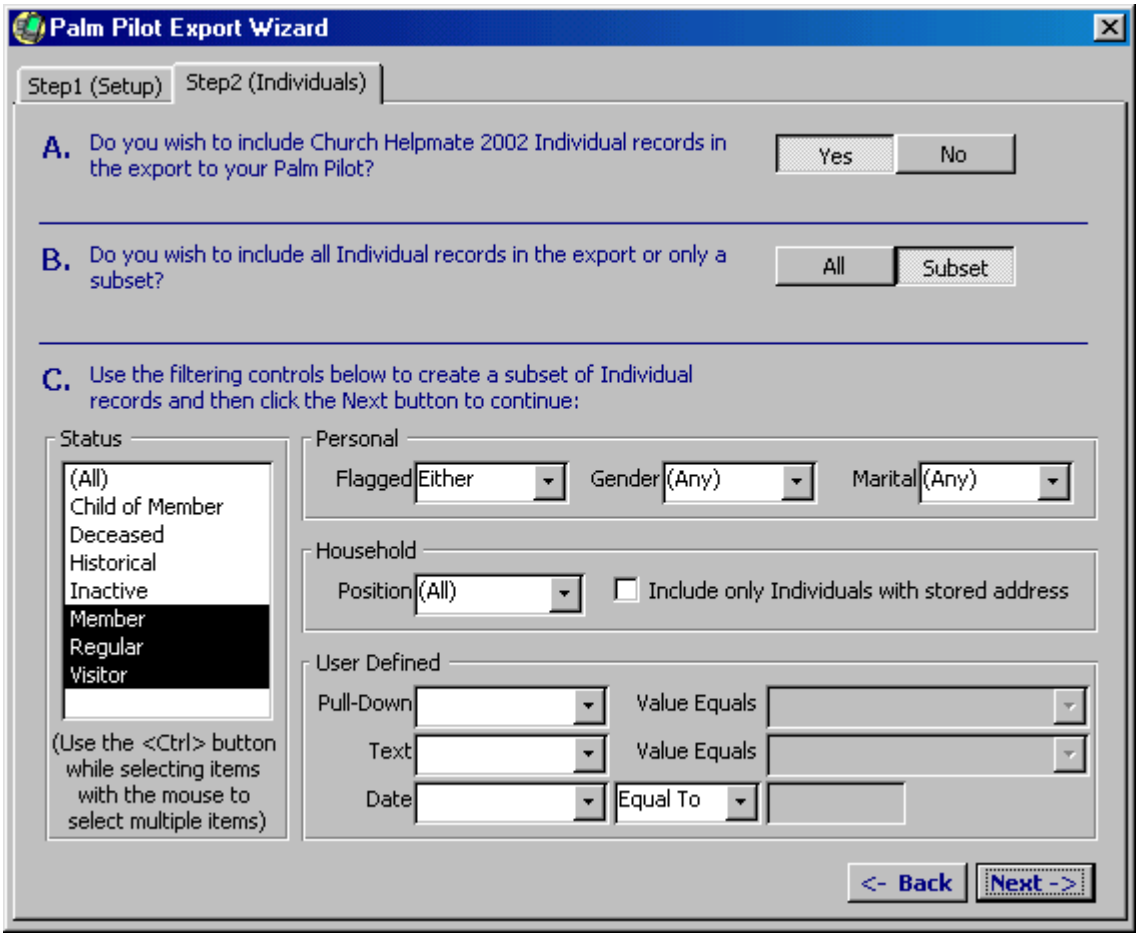
In Step 1, you will be reminded of the necessary steps you will have to perform if you want to maintain any of the existing records in your Palm Pilot's address book.

Also, the first time you run the CH2002 Palm Pilot Export Utility, you will be asked to enter the path to your Palm Desktop software (default location is "C:\Palm") and the user name given to your Palm Pilot. You can modify these configuration fields (Pilot Path and User Name) at any time by clicking on the Change button.

Click the Next button to proceed to Step 2.

Step 2: INDIVIDUALS

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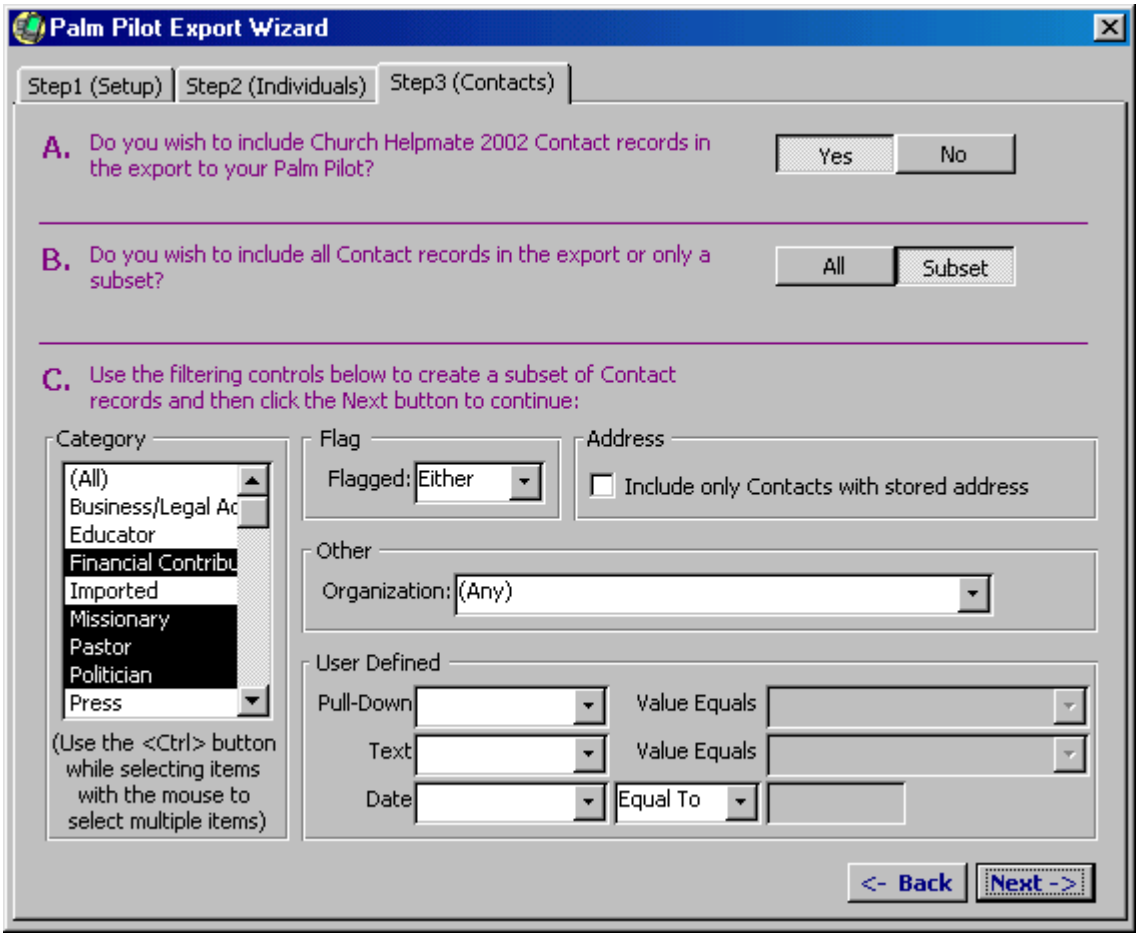


In section A of Step 2, you will indicate whether or not you want to include your CH2002 Individual records in the Palm Pilot export. If you chose "Yes" in section A, in section B you will indicate whether or not you want to include "All" of the Individual records in the CH2002 database or only a "Subset". If you chose "Subset" in section B, in section C you will indicate which Individual records you would like to include in the Palm Pilot export.

Click the "Next" button to proceed to Step 3.

Step 3: CONTACTS

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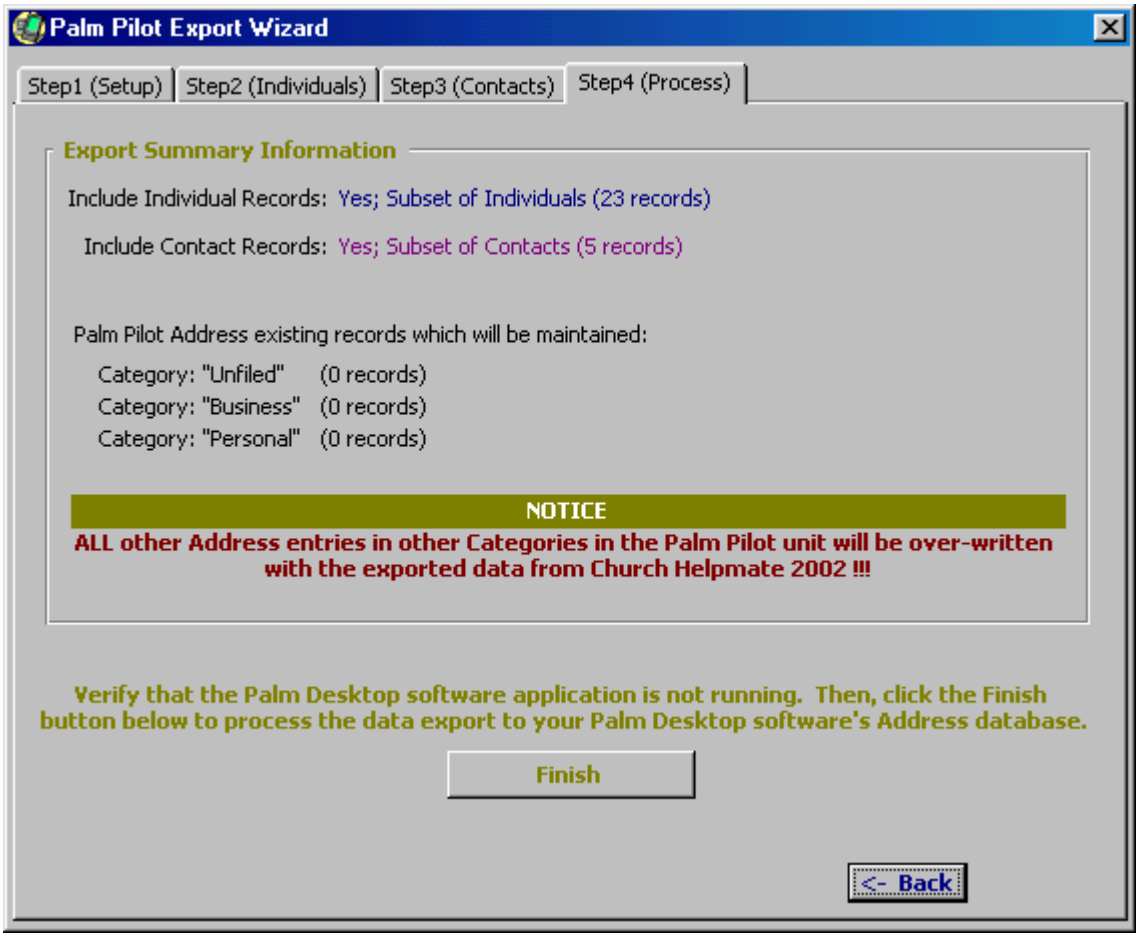


In section A of Step 3, you will indicate whether or not you want to include your CH2002 Contact records in the Palm Pilot export. If you chose "Yes" in section A, in section B you will indicate whether or not you want to include "All" of the Contact records in the CH2002 database or only a "Subset". If you chose "Subset" in section B, in section C you will indicate which Contact records you would like to include in the Palm Pilot export.

Click the "Next" button to proceed to Step 4.

Step 4: PROCESS

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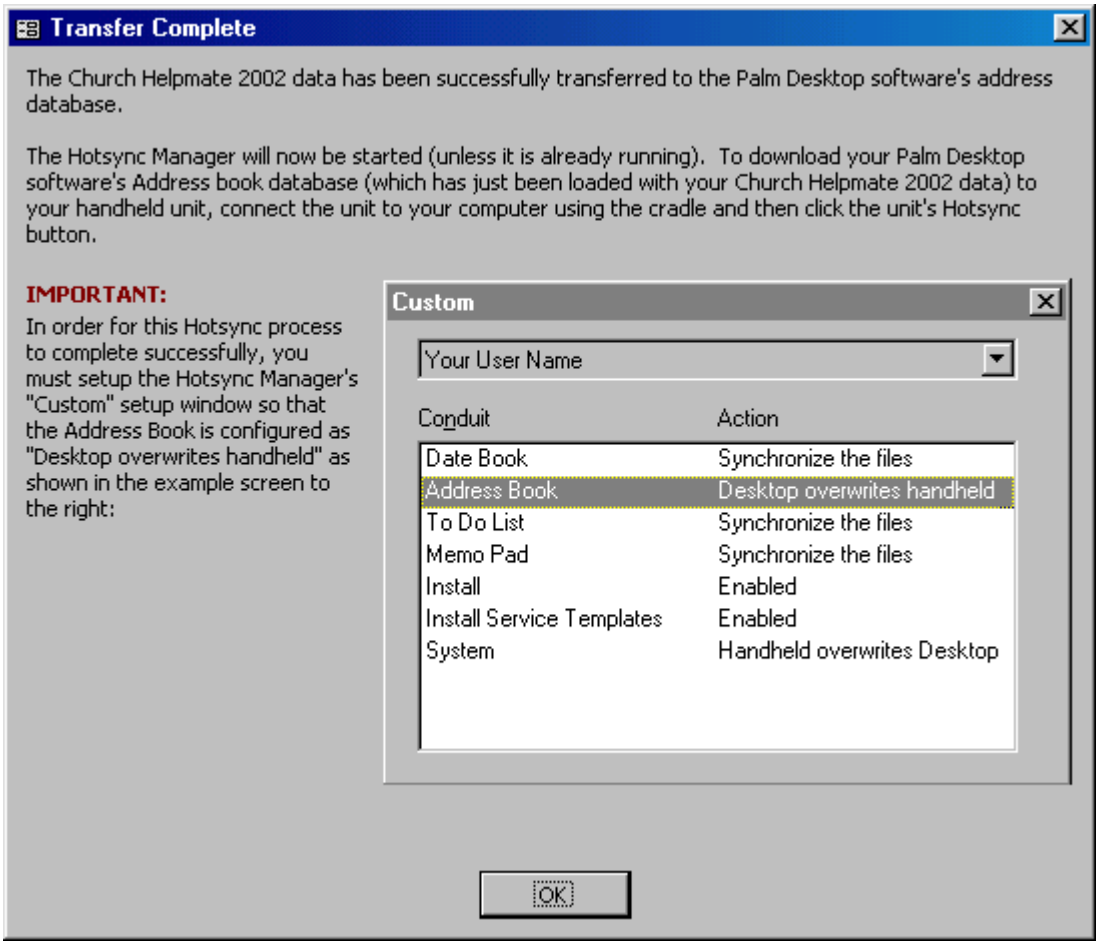

Palm Pilot Export Wizard
Step1 (Setup)
Step2 (Individuals)
Step3 (Contacts)
Step4 (Process)
Export Summary Information
Include Individual Records: Yes; Subset of Individuals (23 records)
Include Contact Records: Yes; Subset of Contacts (5 records)
Palm Pilot Address existing records which will be maintained:
Category: "Unfiled" (0 records)
Category: "Business" (0 records)
Category: "Personal" (0 records)
NOTICE
ALL other Address entries in other Categories in the Palm Pilot unit will be over-written with the exported data from Church Helpmate 2002 !!!
Verify that the Palm Desktop software application is not running. Then, click the Finish button below to process the data export to your Palm Desktop software's Address database.
Finish
<- Back

In Step 4, you will be shown a summary of export statistics (number of Individual records to be exported, number of Contact records to be exported, etc.).

To proceed with the export process, click the "Finish" button.

Upon completion of the data export process, you will receive the following confirmation screen:

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Transfer Complete
The Church Helpmate 2002 data has been successfully transferred to the Palm Desktop software's address database.
The Hotsync Manager will now be started (unless it is already running). To download your Palm Desktop software's Address book database (which has just been loaded with your Church Helpmate 2002 data) to your handheld unit, connect the unit to your computer using the cradle and then click the unit's Hotsync button.
IMPORTANT:
In order for this Hotsync process to complete successfully, you must setup the Hotsync Manager's "Custom" setup window so that the Address Book is configured as "Desktop overwrites handheld" as shown in the example screen to the right:
Custom
Your User Name
Conduit
Action
Date Book
Synchronize the files
Address Book
Desktop overwrites handheld
To Do List
Synchronize the files
Memo Pad
Synchronize the files
Install
Enabled
Install Service Templates
Enabled
System
Handheld overwrites Desktop
OK

At this point, the selected CH2002 data records have been exported to the Palm Desktop software's address book database. You can now transfer this data to your hand-held unit using the Hotsync process. To begin the Hotsync process, connect your hand-held unit to your computer using the cradle and then click the unit's Hotsync button.

In order for this Hotsync process to complete successfully, you must setup the Hotsync Manager's "Custom" setup window so that the Address Book is configured as "Desktop overwrites handheld" as shown in the screen-shot above.

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14.10 Custom Report Generator

(Chapter 13 - Tools)

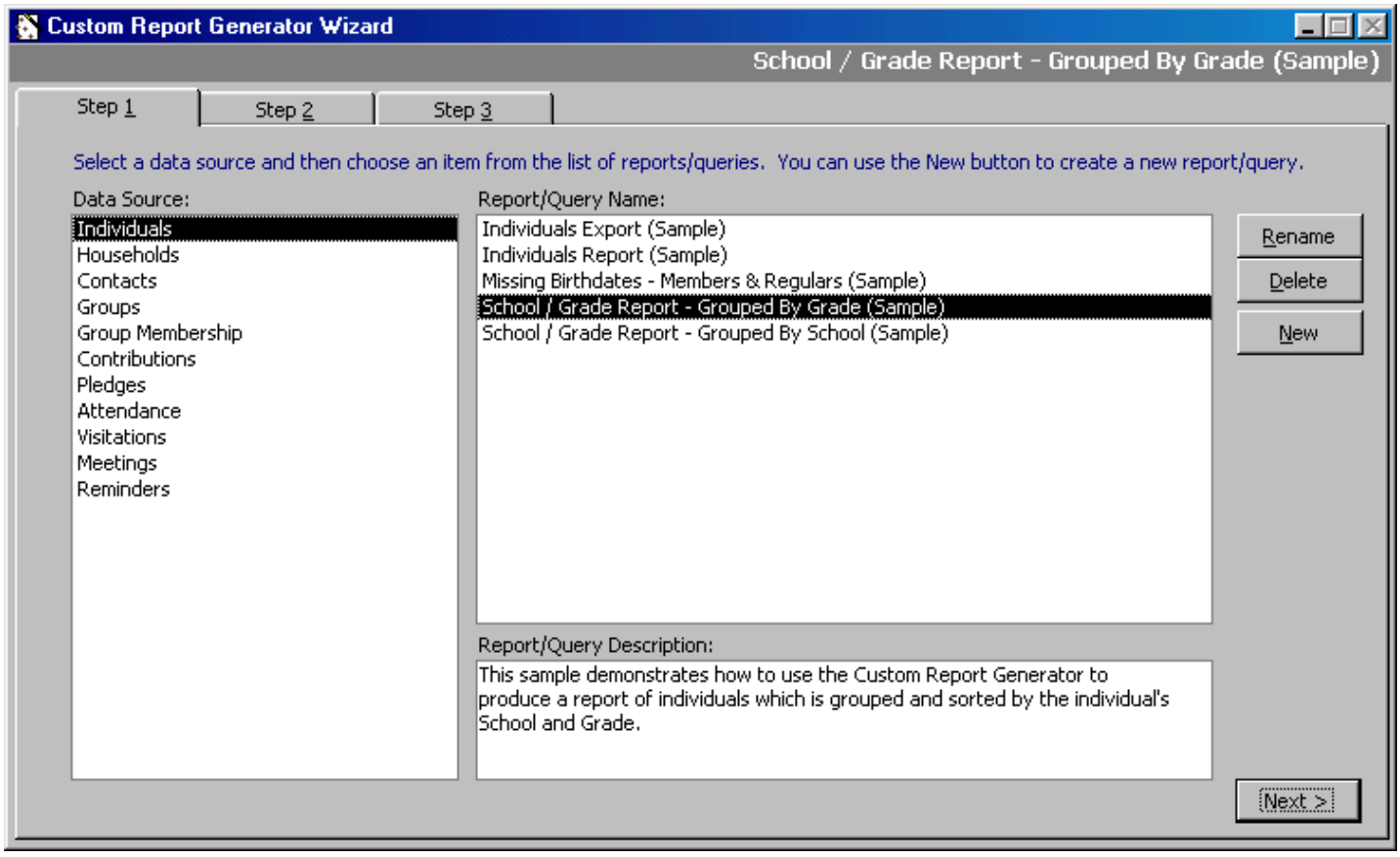
The CH2002 Custom Report Generator is a tool which enables you to create custom reports CH2002 reports and save them for later use. In addition to generation of reports, this tool also allows you to output the report results to mailing labels, exported files, and MS Word mail merges.

To open the CH2002 Custom Report Generator, select "Tools | Custom Report Generator" from the CH2002 Navigation Menu or from the main menubar. Alternately, you can start-up the Custom Report Generator by selecting its icon found under the Windows "Start" button ("Start | Programs | Church Helpmate 2002 | Custom Report Generator")

The Custom Report Generator provides 3 steps (or stages) in the report generator process:

STEP 1

The "Step 1" of the Custom Report Generator is where you'll initially begin. The first thing you'll need to do is specify the Data Source from the list on the left-hand side of the form. After choosing a Data Source, the "Report/Query Name" list will be populated with the custom reports which have been saved for the selected Data Source. Here you can use the "Rename", "New", "Delete" buttons to maintain the listing of custom reports.


Custom Report Generator Wizard
School / Grade Report - Grouped By Grade (Sample)
Step 1
Step 2
Step 3
Select a data source and then choose an item from the list of reports/queries. You can use the New button to create a new report/query.
Data Source:
Individuals
Households
Contacts
Groups
Group Membership
Contributions
Pledges
Attendance
Visitations
Meetings
Reminders
Report/Query Name:
Individuals Export (Sample)
Individuals Report (Sample)
Missing Birthdates - Members & Regulars (Sample)
School / Grade Report - Grouped By Grade (Sample)
School / Grade Report - Grouped By School (Sample)
Rename
Delete
New
Report/Query Description:
This sample demonstrates how to use the Custom Report Generator to produce a report of individuals which is grouped and sorted by the individual's School and Grade.
Next >

When you've selected a Data Source and a Report/Query Name, click on the "Next" button at the bottom of the form to proceed to Step 2.

STEP 2

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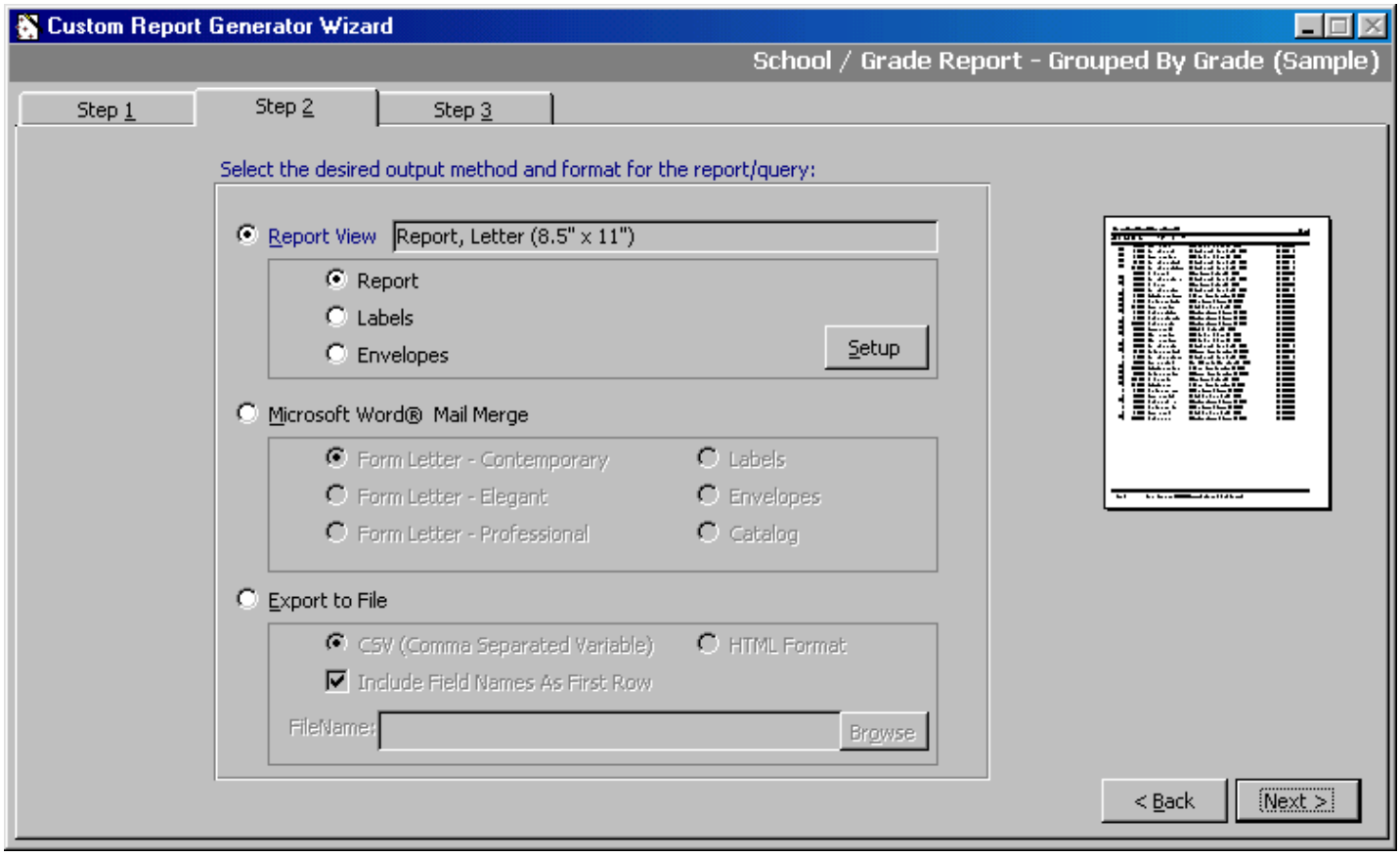
In Step 2, you'll specify the output method and format you desire. You have several options here. There are 3 main output categories: Report, Microsoft Word Mail Merge, and Export to File.

Report Output: If you want a printed report to be generated, then this is the output method you'll most likely want to choose. There are 3 report formats available: Report, Labels, Envelopes.

When selecting this output method, you'll need to click the Setup button to configure details regarding the report, such as margins, paper layout, and other such settings.

Microsoft Word Mail Merge: If you want to merge the report's data to Microsoft Word, then this is the output method you'll most likely want to choose. There are 6 mail merge document formats available: Form Letter - Contemporary, Form Letter - Elegant, Form Letter - Professional, Labels, Envelopes, and Catalog. This output method requires that you have MS Word 97 installed.

Export to File: If you want to export the report's data to an external file for use with another application, then this is the output method you'll most likely want to choose. There are 2 export file formats: CSV (comma separated variable) and HTML. You also have the option of whether or not you want the first row in the exported file to contain the data field names.



When you've selected the output method you desire, click on the "Next" button at the bottom of the form to proceed to Step 3.

STEP 3

Here in Step 3 is where you'll specify exactly which data fields you wish to be included in your report as well as other

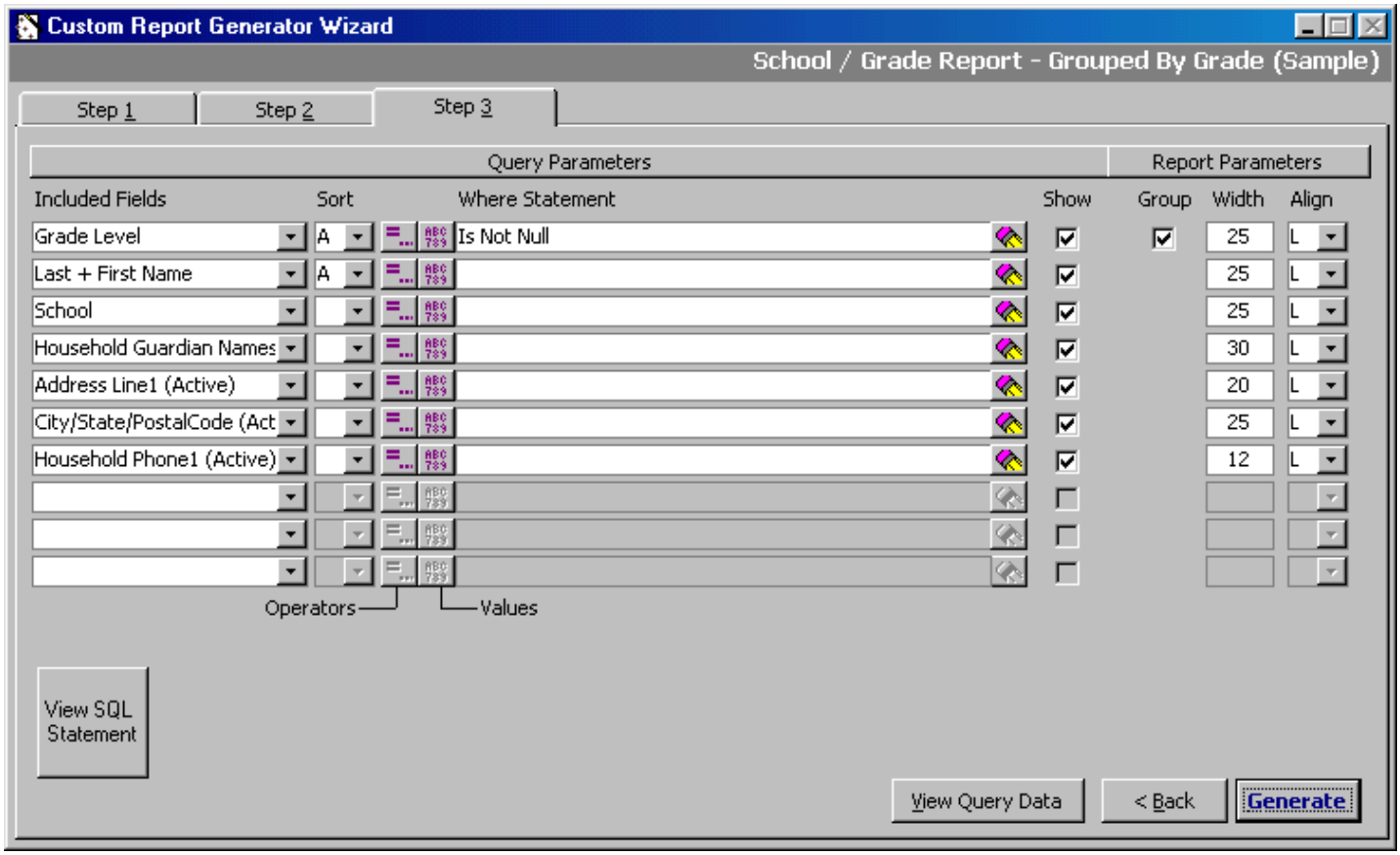
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criteria and details regarding the data fields.

For each data field you select (using one of the "Included Fields" pull-down lists), there are several parameters which you can specify for that data field including whether or not you wish to sort on the field, if you wish to specify a criteria for the field ("Where Statement"), and if you wish to show the field in the output. If in Step 2 you specified the output method to be a Report, then an additional set of parameters will be displayed with options for the field's display on the report.

In the graphic shown above for Step 3, you can see how the sample "School / Grade Report" has been configured. There are 7 selected data fields: Grade Level, Last + First Name, School, Household Guardian Names, Address Line 1, City/State/PostalCode, and Household Phone1. The output will be grouped (divided) by each distinct value for Grade Level. Within each Grade Level grouping the data will be sorted in accending order by the Last + First Name field. The "Where Statement" of the Grade Level field has been specified such that Individuals with a blank (empty) Grade Level field will NOT be included in the output. The Report Parameters section will control the width of each field on the report and its alignment justification.

After specifying the data fields and setting the parameters you desire, you can click on the "View Query Data" button to view on the screen the actual data records and fields which will be included in the output. The "View SQL Statement" button is available for those who'd like to view the actual SQL statement which has been automatically generated by the selection of data fields and parameters.



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14.11 Database Repair Utility

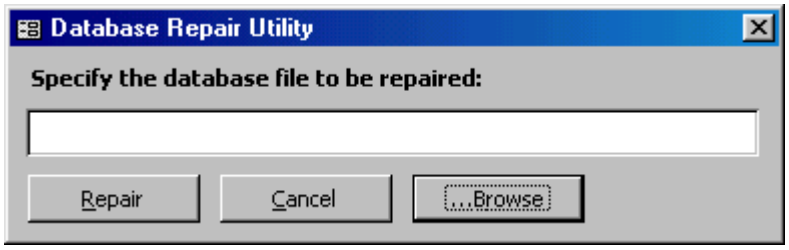
(Chapter 13 - Tools)

Certain factors may leave your CH2002 data file damaged (or corrupted). The symptoms of a corrupted database can range from #Deleted appearing in certain records, to the inability to open one of the objects in the database, to the complete inability to open the file in MS Access. The CH2002 Repair utility is a useful tool for recovering and optimizing Microsoft Access database files.

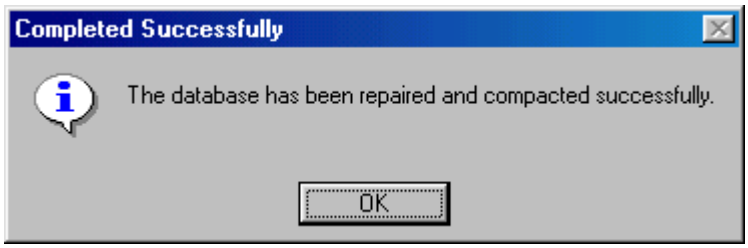
To start the Database Repair Utility, select its icon from the CH2002 "Start" menu program group:

"Windows 'Start' button | Programs | Church Helpmate 2002 | Utilities | Repair Utility"

Upon starting the Database Repair Utility, the following screen will be displayed. Here you must specify the location and filename of the MS Access database file (.mdb) you wish to be repaired. You can use the "Browse" button to search the computer and network resources for a file. Clicking the "Repair" button will begin the repair process.



Upon successful repair, the following message will be displayed.



NOTE: Before attempting to run the Database Repair Utility, verify that the following conditions are met:

- Sufficient disk space must exist for both the original and repaired versions of the database. The repaired database is renamed as the original database only when the repair process is successful.
- Other users must not have the database open. When a database is repaired, it has to be open exclusively by Microsoft Jet to prevent any users from accessing and modifying the database during the process.

DATABASE CORRUPTION CAUSES:

According to Microsoft, there are two main causes of corruption in Microsoft Access/Jet mdb files.

1. **Database is Suspect/Corrupted Due to Interrupted Write Operation**

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You should always quit CH2002 and other MS Access database applications properly by clicking Exit from the File menu or by clicking the Close "X" button in the upper right-hand corner of the program's window. If a database is open and writing data when CH2002 is abnormally shut down, the Jet database engine may mark the file as suspect/corrupted. This can happen if the computer is manually turned off without first shutting down Windows or if power is lost. Other situations may not shut down CH2002 but may still interfere with Jet's writing of data to the disk while the database is open. This can happen, for instance when networks experience data collisions or disk drives malfunction. If any of these interruptions occur, then Jet may mark the database as potentially corrupted.

When Jet begins a write operation, it sets a flag, and resets the flag when the operation is completed. If a write operation is interrupted, the flag remains set. When you try to open that database again, Jet determines that the flag is set and reports that the database is corrupted. In most cases, the data in the database is not actually corrupted, but the set flag alerts Jet that corruption may have occurred. In cases such as this, compacting and/or repairing the database can typically restore the database.

2. Faulty Networking Hardware

In this case, the file corruption does not involve the Jet database engine; rather the file is literally corrupted by some outside cause. The cause can be one or more links in the hardware chain between the computer that the CH2002 program/application file resides on and the computer that is holding the main CH2002 data file. This list includes, but is not limited to, network interface cards, network cabling, routers, and hubs.

Hardware-based corruption is typically indicated by .mdb files that cannot be restored through the use of compacting or repairing. Hardware corruption will typically recur until the responsible hardware is repaired or replaced.

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Chapter 15

15 Chapter 15 - Work@Home

15.1 Chapter 15 - Work@Home



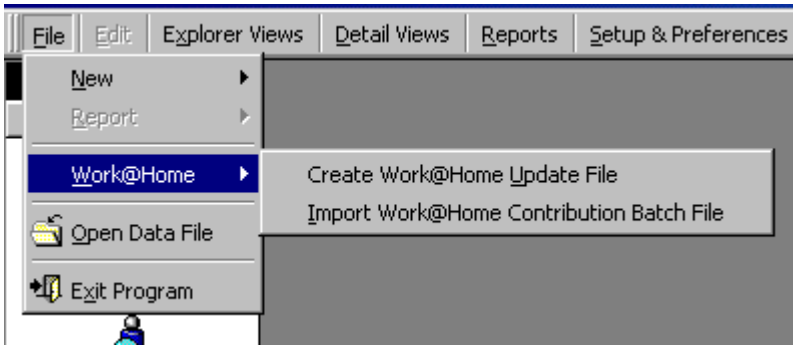
The CH2002 "Work@Home" functionality allows contributions to be entered on a computer that is not hooked up or linked to the main common CH2002 data file. This would be the case, for example, of a volunteer who wishes to enter contribution data from her home computer - but the main CH2002 data file is back at the church office. With CH2002 Work@Home Contributions, she can enter the contribution records at home and then send this information back to the church office (by email, on a floppy disk, etc.) where it can be imported (merged) into the main CH2002 data file. The CH2002 Work@Home Contributions program is a scaled-down version of the full CH2002 product which only contains contribution-related forms and reports. Contribution data entry is performed in exactly the same fashion as within the main CH2002 product.

With CH2002 Work@Home Contributions, contribution data entry can now be accomplished from any computer - anywhere.

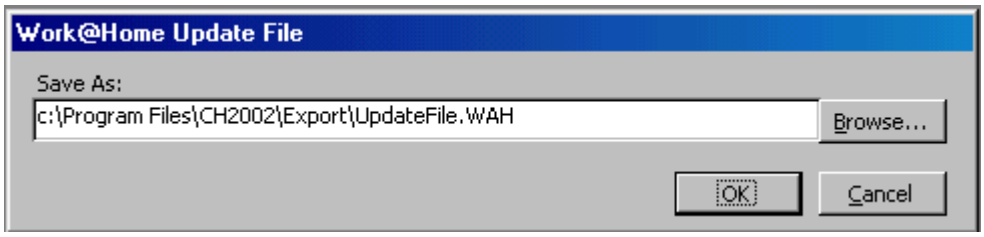
Work@Home Contributions - Process Overview

Work@Home Update File Creation:

The first step in implementing the Work@Home Contribution module is to generate a Work@Home Update file (.WAH) from a computer running the main CH2002 program and connected to the main CH2002 data file (for example, the main church office computer). To create a Work@Home Update file, select "File | Work@Home | Create Work@Home Update File" from the CH2002 top main menubar as shown below.



Selecting the "Create Work@Home Update File" option will display the following dialog box:



You will be able to designate the location and filename for the Work@Home Update file. The default value can be set under "Setup & Preferences | General Program Preferences". Work@Home Update files have a file extension of "WAH" (for example, "UpdateFile.WAH").

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Work@Home Update File Import:

On the remote computer running the CH2002 Work@Home Contributions program, the WAH Update file (.WAH) created by the main CH2002 program will need to be imported. This import process ensures that the listing of Household, Individual, and Contact contributors is identical between the main CH2002 data file and the remote Work@Home database. To import the WAH Update file, choose "File | Import Work@Home Update File" from the Work@Home program's top main menubar and select the desired WAH Update file.

Contribution Entry:

On the remote computer running the CH2002 Work@Home Contributions program, contribution entry can now be performed. One or more contribution batches can be created and populated with contribution records.

Work@Home Contribution Batch File Export:

Once contribution data entry has been completed for 1 or more batches, you are ready to export a Work@Home Contribution Batch File (.WHC file) from the remote computer. This file will contain all the information about the batch and all contributions contained within it.

Work@Home Contribution Batch File Import:

Back at a computer running the full CH2002 program and attached to the main CH2002 data file, you will import the Contribution Batch file (.WHC file) which was created by the remote computer running the Work@Home program. To do so, select "File | Work@Home | Import Work@Home Contribution File" and choose the desired WHC file. This process will import the batch and batch's contributions into the main CH2002 data file. This information will then be accessible from within the main CH2002 program.

For more specific information about working with the Work@Home Contribution program, please refer to the helpfile distributed with this product.

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Chapter 16

16 Chapter 16 - Reference Information

16.1 Chapter 16 - Reference Information

Chapter 16 Sections:

- Data Entry Procedures
- Data Entry Keys
- Shortcut Keys
- Mouse Operations
- Menubars & Toolbars
- Status Bars
- Check Boxes
- Radio Buttons (Option Buttons)
- Pull-Down Lists
- List Boxes
- ListBar Controls
- ListView Controls
- TreeView Controls

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16.2 Data Entry Procedures

(Chapter 16 - Reference Information)

Many of the forms and dialog boxes in CH2002 display blank spaces, called fields, ready for you to enter information much as you would using a word processor.

You can move from field to field using the Tab key or your mouse. Using the Tab key will move you in a left to right, top to bottom order, as if you were reading a book. To move backwards (to return to a previous field), press Shift+Tab. When using a mouse, simply click on the desired field and the cursor or highlight will move to that field.

If a certain field on a form is NOT able to be edited, the field will be grayed or dimmed. You cannot make changes to that field.

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16.3 Data Entry Keys

(Chapter 16 - Reference Information)

Some common cursor-movement and editing keys are listed here. These keys operate as indicated in most data entry fields.

Left Arrow - Moves the cursor one position to the left (or to the previous field when the entire field value is selected).

Right Arrow - Moves the cursor one position to the right (or to the next field when the entire field value is selected).

Up Arrow - Scrolls the screen up.

Down Arrow - Scrolls the screen down.

PgUp - Moves the cursor up one screen.

PgDn - Moves the cursor down one screen.

Home - Moves the cursor to the beginning of the line where the cursor is positioned.

End - Moves the cursor to the end of the line where the cursor is positioned.

Del - Deletes the character in the current cursor position (in a form or dialog box).

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16.4 Shortcut Keys

(Chapter 16 - Reference Information)

Keyboard Shortcuts for CH2002 Detail View forms:

New Record: **CTRL + N**

Edit Record: **CTRL + E**

Save Record: **CTRL + S**

Print: **CTRL + P**

Cancel Edits: **CTRL + Z**

Delete Record: **CTRL + D**

Expand Search Pull-Down List: **CTRL + W**

Close Form: **CTRL + Q**

General Keyboard Shortcuts:

Move to next field in form or dialog box: **TAB**

Move to previous field in form or dialog box: **SHIFT + TAB**

Move to next tab in form or dialog box: **CTRL + TAB**

Move to previous tab in form or dialog box: **CTRL + SHIFT + TAB**

Expand pull-down list control: **ALT + DOWN ARROW**

Close pull-down list control: **ESC**

Select or clear a checkbox control: **SPACEBAR**

Move between options in the selected pull-down list or between options in a group of options: **Arrow Keys**

To undo changes in the current field: **ESC**

To move one character to the right in a text box: **RIGHT ARROW**

To move one word to the right in a text box: **CTRL + RIGHT ARROW**

To move one character to the left in a text box: **LEFT ARROW**

To move one word to the left in a text box: **CTRL + LEFT ARROW**

To move to the end of the value in a text box: **END**

To move to the beginning of the value in a text box: **HOME**

To copy a selected text to the Clipboard: **CTRL + C**

To paste the contents of the Clipboard at the cursor position: **CTRL + V**

To delete the selection or character to the left of the cursor position: **DEL**

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16.5 Mouse Operations

(Chapter 16 - Reference Information)

Most program options can be selected using either the keyboard or a mouse. Because most Windows users tend to use a mouse, we emphasize mouse operation in the CH2002 documentation. If you are new to mouse operations, please refer to your Windows manual for assistance.

When using the mouse buttons, it is important not to forget about the right button. While the left button is used in most cases (to select screen items), the right button can be used to activate context-sensitive pop-up menus which can be helpful in navigating through the application and can speed up data entry. The list of items available in these pop-up menus are appropriate to your location in the application (the context). If you are not sure whether a certain object has a pop-up context menu option, just click the right mouse button to find out.

In the CH2002 documentation, a mouse "click" is understood to be a left mouse button click. A mouse "right-click" is specified when a click of the mouse's right button is intended.

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16.6 Menubars & Toolbars

(Chapter 16 - Reference Information)

MENUBARS

The CH2002 application's main menubar is located just beneath the application's main title bar. This menubar provides a navigational system for the application which can be utilized through mouse or keyboard operations. The operation of the menubar is similar to most other Windows-based applications. Each menu lists a "family" of selections, and each selection performs a specific action.

The CH2002 main menubar will change slightly depending on active form and whether or not the current form is a Detail or Explorer View form.

Using the Menus

- You can open a menu by clicking it, or by pressing <Alt> plus the letter that is underlined in the menu's title. For example, to open the File menu, you press <Alt> + <F>.
- You can choose a menu selection by clicking it, by pressing its underlined letter, or by using the cursor (arrow) keys to highlight it and then pressing <Enter>. Any menu selections that appear in grey are disabled and not currently available.

TOOLBARS

Toolbars are essentially a collection of buttons located on a form which allow quick access to the most common functions of the form. The CH2002 application utilizes form-based toolbars. That is, toolbars are located on their associated forms (at the top of the form's window).

Using Toolbars

To activate a toolbar button, you can either click the button using the mouse or position the cursor onto the button (using the Tab key) and then press the <Enter> key. Most CH2002 toolbar buttons have an associated "tool-tip" which is a short description of the button which is displayed on the screen when the mouse cursor is positioned over the button. Tool-tips are very helpful when first learning the application, since they will tell you about the button without having to activate it. Any toolbar buttons that appear dimmed are disabled and not currently available.

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16.7 Status Bars

(Chapter 16 - Reference Information)

The status bar appears at the bottom of the CH2002 window. It provides important information as you work in the program, such as general program information and hints for operating the program.

In addition to the main status bar, most of the CH2002 Detail Forms have their own status bar as well. These Detail Form status bars display various status information about the current record such as the record creation and modification dates. An example Detail View status bar is shown below:



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16.8 Check Boxes

(Chapter 16 - Reference Information)

Some dialog boxes and forms in the program contain check boxes you can use to mark options. For example, you will mark an individual as the Main Contact of their household by placing a mark in the checkbox as shown below:



When you click on a check box with your mouse or press your spacebar, a check mark appears in the box. Note that when you open some dialog boxes and forms, one or more items already may be marked by default.

To change the selection, move the cursor to the box in front of the option of interest and press the spacebar or click on it with your mouse. If the item was previously selected, the mark is removed from the box. If the item was not selected, a mark appears in the box.

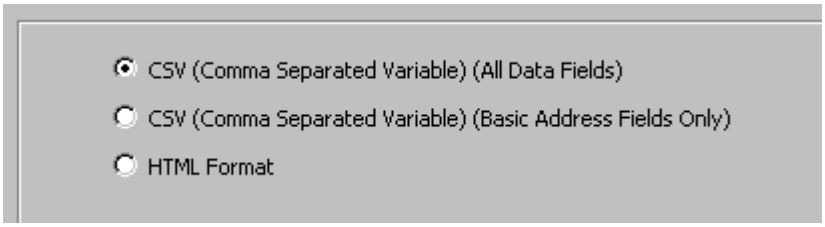
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16.9 Radio Buttons (Option Buttons)

(Chapter 16 - Reference Information)

In some forms and dialog boxes, you will encounter radio buttons (also known as option buttons or option groups). Radio buttons are used for options where you can make only ONE choice. One radio buttons is selected by default, but you can change this selection by clicking on another radio button. The selection will move from the default to your new choice. You cannot deselect a radio button by clicking on it; you must select another option.

An example of a radio button control is shown below:



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16.10 Pull-Down Lists

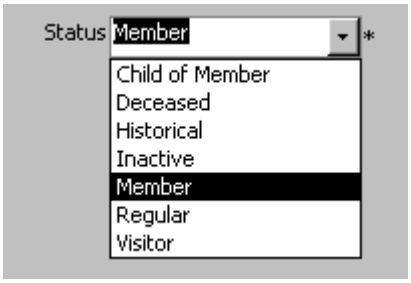
(Chapter 16 - Reference Information)

In many data entry fields, you can click on a down arrow at the right end of the field to drop down a list showing suggested or allowable entries. These controls are know as "Pull-down lists".

For example, when your cursor is positioned in a field where you are to enter the marital status of an individual, clicking the arrow opens (expands) a list with the options you set up in the CH2002 Individuals Setup form ("Setup & Preferences | Individuals Setup" from the main menubar or Navigation Menu). You can also open the list by pressing the ALT + DOWN ARROW keys on your keyboard when the pull-down list is the active control. You can use your arrow keys to highlight the option you want and press Enter (or simply click on the item with your mouse) to paste that name in the field.

Pull-down list fields also have an "auto-fill" behavior. When you enter characters in the text box portion of a pull-down list, CH2002 searches the values in the list to find those that match the characters you have typed. The pull-down list will automatically display the first underlying value that matches the characters entered so far. This lets you quickly enter an existing value in a pull-down list without displaying the full pull-down list or having to click on the down arrow button.

Shown below is a pull-down control which has been opened (or expanded) by clicking on its down arrow button:



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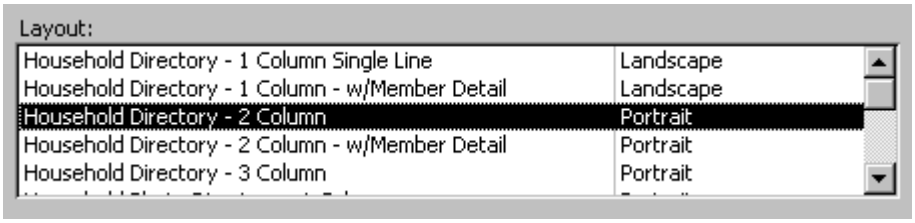
16.11 List Boxes

(Chapter 16 - Reference Information)

The List Box control allows you to select a value from a list of available values. In many cases, it's quicker and easier to select a value from a list than to remember a value to type. A list of choices also helps to ensure that the value that's entered in a field is correct.

The list in a list box consists of rows of data. Rows can have one or more columns, which can appear with or without headings. You can select a value from a list box control by clicking the desired value with the mouse or by using the arrow buttons to move the currently selected value.

An example of a list box control is shown below:

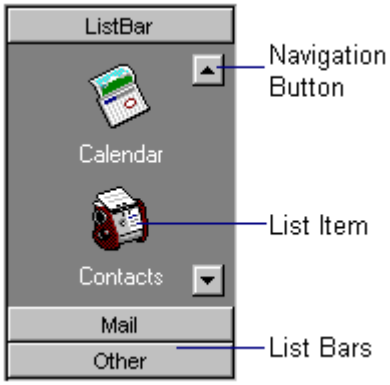


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16.12 ListBar Controls

(Chapter 16 - Reference Information)

An example of a ListBar control is shown below. The List Bar panel is a list control capable of containing separate lists of icons. The user can select a new list by simply clicking the mouse on a list bar. If there are more list items in a list that can be displayed within the control, the user can click a navigation button to move to the new items.



The CH2002 Navigation Menu is an example of a ListBar Control.

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16.13 ListView Controls

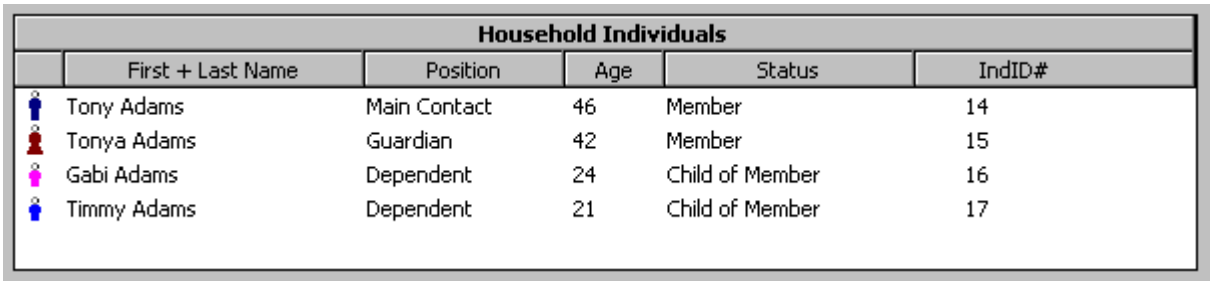
(Chapter 16 - Reference Information)

ListView controls are essentially elegant List Box controls. ListView controls consist of data presented in rows and columns. Each row will generally have an icon in the first (left-hand) column. ListView controls are extremely flexible in how they display data and provide the following functionality:

- You can adjust the width of any column by clicking and dragging the column in the column header section.
- You can select which field is used to sort the rows of data by clicking on the desired column's header. Subsequent clicking on the column's header will toggle between ascending and descending sort order.

When selecting an item (row), use the mouse to click either the item's icon or the text in the first column. Using the Up and Down arrow keys on the keyboard will move the cursor's position from row to row. Right clicking an item will enable a pop-up menu if one exists for the ListView control.

Shown below is an example of the ListView control used by the Household Detail form to display the household's individuals:



Household Individuals

First + Last Name	Position	Age	Status	IndID#
Tony Adams	Main Contact	46	Member	14
Tonya Adams	Guardian	42	Member	15
Gabi Adams	Dependent	24	Child of Member	16
Timmy Adams	Dependent	21	Child of Member	17

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16.14 TreeView Controls

(Chapter 16 - Reference Information)

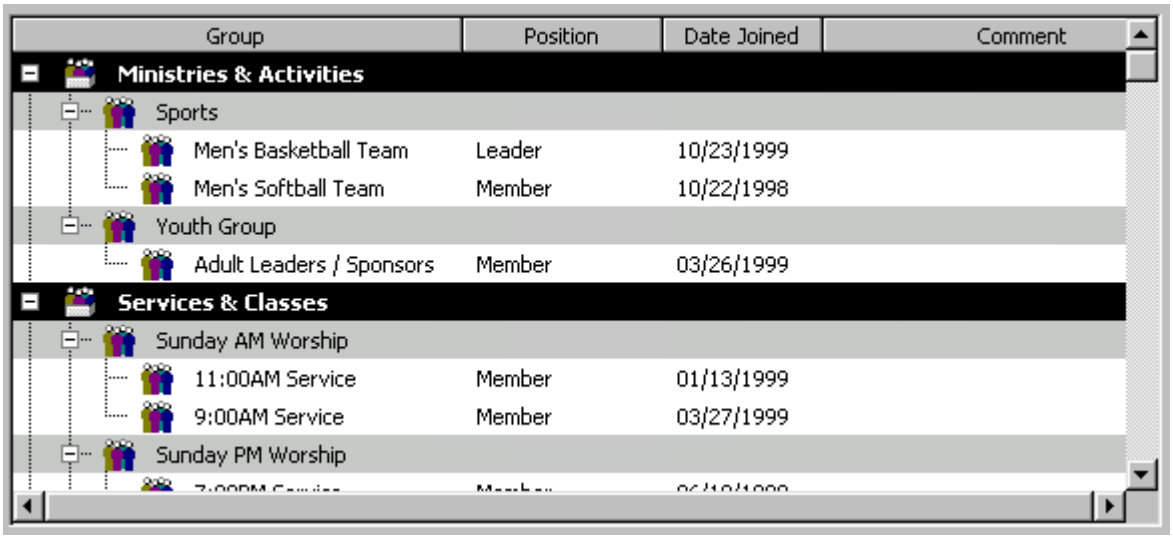
A TreeView control displays a hierarchical list of Node objects, each of which consists of a label and an icon. CH2002 utilizes TreeView controls in several areas where it provides the most effective means of displaying and organizing data records as a hierarchy.

You can navigate through a TreeView control using the mouse or the keyboard.

Mouse: To select a TreeView node (object), click the node's text or icon. You can expand a TreeView node by clicking on the plus sign to the left of the node or by double-clicking the node. To collapse an expanded node, click the minus sign to the left of the node or double-click the node. Right clicking a node will enable a pop-up menu if one exists for the TreeView.

Keyboard: UP ARROW and DOWN ARROW keys cycle downward through all expanded Node objects. Node objects are selected from left to right, and top to bottom. At the bottom of a tree, the selection jumps back to the top of the tree, scrolling the window if necessary. RIGHT ARROW and LEFT ARROW keys also tab through expanded Node objects, but if the RIGHT ARROW key is pressed while an unexpanded Node is selected, the Node expands; a second press will move the selection to the next Node. Conversely, pressing the LEFT ARROW key while an expanded Node has the focus collapses the Node. If you press one of the letter keys, the focus will jump to the nearest Node that begins with that letter. Subsequent pressings of the key will cause the selection to cycle downward through all expanded nodes that begin with that letter.

Shown below is an example of the TreeView control utilized by the Individuals Detail form to indicate the current individual's group memberships:



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Chapter 17

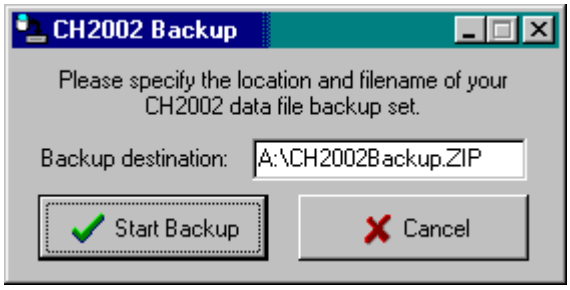
17 Chapter 17 - Backup & Restore Functions

17.1 Chapter 17 - Backup & Restore Functions

The Church Helpmate 2002 program utilizes a single Microsoft Access database file (.mdb file) to hold all of your church's data records (names, addresses, contribution data, etc.). This file is referred to as the CH2002 "*data file*". To determine the exact location and filename of the currently active CH2002 data file, select "Setup & Preferences | General Program Preferences". The current CH2002 data file information will be displayed on the "General" tab in the upper left-hand corner. CH2002 provides you the ability to maintain an unlimited number of different CH2002 data file sets - however, only 1 can be active at any one time. You can use the "Change" button on the Preferences screen to change the currently active CH2002 data file at any time. The exact location and filename of a CH2002 data file can be determined by you. The default location and filename for the CH2002 data file is "C:\Program Files\CH2002\CH2002data.mdb". However, if you are using CH2002 in a multi-user, network scenario, the data file will likely be in a different location (for example, in a folder on the network server). See Chapter 3 - Network/Multi-User Setup for more details.

BACKUP

It is crucial to maintain regular backups of your CH2002 data file. There are many factors which can contribute to partial or complete data loss such as hard-drive failures, computer viruses, etc. The CH2002 program provides a built-in menu selection for creating a CH2002 datafile backup. From the CH2002 Explorer's main menubar, select "Tools | Database Utilities | Backup Data File" to begin the backup process. The following screen will be displayed:



Clicking the "*Start Backup*" button will create a "backup set" of your CH2002 data file. The location and filename of this backup set is determined by the "*Backup destination*" parameter. You can specify a default value for the Backup destination parameter through the General Program Preferences screen ("Setup & Preferences | General Program Preferences").

A CH2002 data file backup set is a single file in the industry standard "zip" format. This zip file contains the CH2002 mdb data file. A backup set zip file is typically much smaller than the actual CH2002 mdb data file it contains. You can expect a backup set zip file size to be about 25% to 50% of the size of the CH2002 mdb data file. The CH2002 backup function can create a backup set on any currently active drive on your computer (for example, floppy drive, "Zip" drive, shared network drive, etc.). If you desire to send the backup set to floppy disk, the backup function supports "multiple floppy disk spanning". This means that if the backup set is larger than can fit on a single floppy disk, you will be prompted to insert additional disks as needed.

CH2002 has a reminder option which, when enabled, will periodically prompt you when closing the CH2002 program and ask whether or not you wish to backup the CH2002 data file. This reminder enable and the reminder frequency is selectable through the General Program Preferences screen ("Setup & Preferences | General Program Preferences").

RESTORE

In the event that you wish to over-write the current CH2002 data file with a data file from a previously create backup set, the

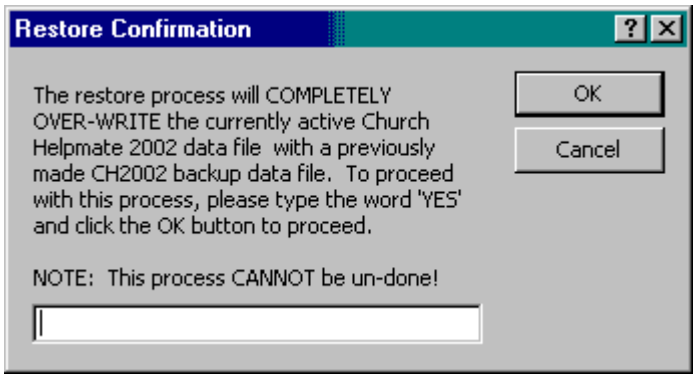
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CH2002 program provides a "restore" function for this purpose. The restore process will over-write the currently active CH2002 data file with the version contained in a selected CH2002 data file backup set.

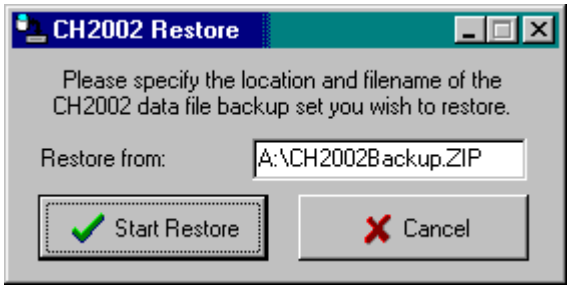
Before attempting to run the restore process, you should:

1. Verify that you wish to wipe out the current CH2002 data file (ie. the file indicated on the "Data File" field on the General Program Preferences screen) and replace it with a data file from a previously made backup set.
2. Verify that no other users are accessing the current CH2002 data file (if you are setup in a multi-user/network usage scenario).

The CH2002 program provides a built-in menu selection for initiating the restore process. From the CH2002 Explorer's main menubar, select "Tools | Database Utilities | Restore Data File". The following screen will be displayed:


Restore Confirmation
The restore process will COMPLETELY OVER-WRITE the currently active Church Helpmate 2002 data file with a previously made CH2002 backup data file. To proceed with this process, please type the word 'YES' and click the OK button to proceed.
NOTE: This process CANNOT be un-done!
OK
Cancel

If you wish to proceed with the restore process, type "YES" into the above confirmation screen and then click the "OK" button. Next, the following screen will be displayed:


CH2002 Restore
Please specify the location and filename of the CH2002 data file backup set you wish to restore.
Restore from:
A:\CH2002Backup.ZIP
Start Restore
Cancel

Clicking the "*Start Restore*" button will replace the current CH2002 data file with the CH2002 data file contained in the zip file specified by the "*Restore from*" parameter above. You can specify a default value for the Restore from parameter through the General Program Preferences screen ("Setup & Preferences | General Program Preferences").

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Chapter 18

18 Chapter 18 - Advanced Topics

18.1 Chapter 18 - Advanced Topics

Chapter 18 Sections:

- Importing Data
- CH2002 & Microsoft Access
- Purging Data

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18.2 Importing Data

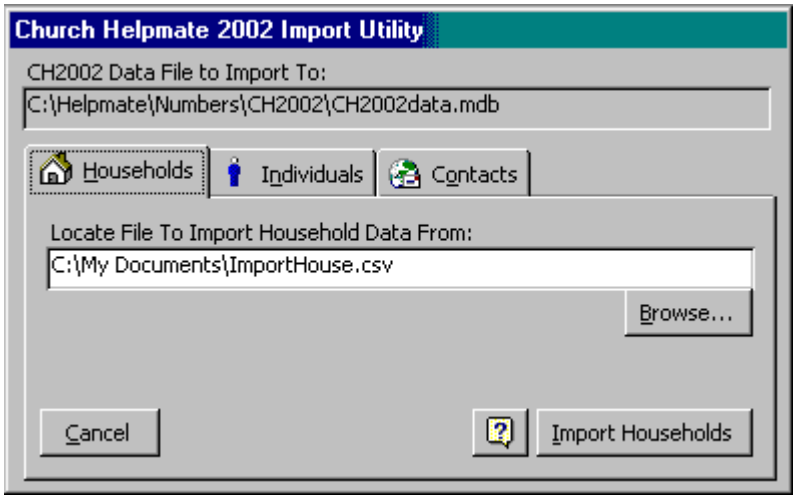
18.2.1 Importing Data

(Chapter 18 - Advanced Topics)

CH2002 provides an *Import Utility* to import Household, Individual, and Contact data records from external text files. This Import Utility can be accessed from the CH2002 program group under the Windows "Start" button:

"Start | Programs | Church Helpmate 2002 | Import Utility"

The Import Utility consists of a single form interface which is displayed below:



The Import Utility form includes 3 separate tabs for each of the 3 import areas (Households, Individuals, and Contacts).

This Import Utility requires that your source file (the file containing the data you wish to import into Church Helpmate™ 2002) be in a specific data format and file format.

- **Required File Format:** The required file format is "Comma Separated Variable" - more commonly known as simply CSV. Files of this type have a .csv file extension. The data fields in a CSV file are separated by comma's - hence the name. CSV files can be generated from most database and spreadsheet applications such as Access, FoxPro, Paradox, Excel, Lotus 123, and many more. Refer to your database or spreadsheet application's literature for generating a file in CSV format.

- **Required Data Format:** In addition to the required file format (CSV), the Import Utility also requires the data in the file to be organized in a certain fashion. Essentially this requirement states that the data fields have to be in a particular order as outlined. If data for a particular field is blank, it must still be represented by including a comma as a placeholder:

  For details see:
  Households Import File Requirements
  Individuals Import File Requirements
  Contacts Import File Requirements

TIP: Helpmate Technology Solutions specializes in assisting our clients with transferring their existing data (whatever format it may be in) into our products. The fees involved for these services are typically much less than you might expect. Contact us today for a no-cost, no-obligation quotation for our data transfer services.

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18.2.2 Households Import File Requirements

(Chapter 18 - Advanced Topics)

Before being able to import Household records from a source text file using the Import Utility, the file must meet the format requirements shown below. Failure to format the source file in the required format will likely result in errors during the import process and could jeopardize the integrity and accuracy of the existing and imported CH2002 data. Sample source text files are included with the installation of CH2002 for your reference when preparing your source files. The sample household import file is named:

- "ImportHouseSample.csv" (sample Households import file)

This (and other) sample file is located in the "Templates" folder which is located on your hard-drive where the CH2002 program was installed. The default location for this folder is "C:\Program Files\CH2002\Templates".

For details on the exact layout requirements of the Household CSV import file, please refer to the Church Helpmate 2002 helpfile (in Chapter 18 - "Importing Data")

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18.2.3 Individuals Import File Requirements

(Chapter 18 - Advanced Topics)

Before being able to import Individual records from a source text file using the Import Utility, the file must meet the format requirements shown below. Failure to format the source file in the required format will likely result in errors during the import process and could jeopardize the integrity and accuracy of the existing and imported CH2002 data. Sample source text files are included with the installation of CH2002 for your reference when preparing your source files. The sample individual import file is named:

- "ImportIndSample.csv" (sample Individuals import file)

This (and other) sample file is located in the "Templates" folder which is located on your hard-drive where the CH2002 program was installed. The default location for this folder is "C:\Program Files\CH2002\Templates".

For details on the exact layout requirements of the Individual CSV import file, please refer to the Church Helpmate 2002 helpfile (in Chapter 18 - "Importing Data")

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18.2.4 Contacts Import File Requirements

(Chapter 18 - Advanced Topics)

Before being able to import Contact records from a source text file using the Import Utility, the file must meet the format requirements shown below. Failure to format the source file in the required format will likely result in errors during the import process and could jeopardize the integrity and accuracy of the existing and imported CH2002 data. Sample source text files are included with the installation of CH2002 for your reference when preparing your source files. The sample Contact import file is named:

- "ImportContactSample.csv" (sample Contacts import file)

This (and other) sample file is located in the "Templates" folder which is located on your hard-drive where the CH2002 program was installed. The default location for this folder is "C:\Program Files\CH2002\Templates".

For details on the exact layout requirements of the Contact CSV import file, please refer to the Church Helpmate 2002 helpfile (in Chapter 18 - "Importing Data")

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18.2.5 HTS Data Transfer Services

(Chapter 18 - Advanced Topics)

HTS Data Transfer Services

Introduction:

You'll be happy to know that choosing the Church Helpmate™ 2002 church management software system does NOT mean that you must abandon the data that you may have in your current system. Whether your current system is another commercial church management software product, or your own "home grown" product, it is very likely that your existing data can be transferred over into Church Helpmate™.

The Benefits:

Allowing HTS to handle your data migration needs, provides you with:

- Peace of mind. Our personnel handling your data transfer project are intimately acquainted with the Church Helpmate™ table and field structure designs. Our years of experience in transferring data from other systems into our products will enable us to choose the most effective transfer process to meet your specific needs.
- The ability to see, in advance, exactly how your existing data will be transferred to Church Helpmate™. As part of our data transfer quotation process, we generate a detailed spreadsheet indicating, field-by-field, exactly how the data will be mapped from your current system into Church Helpmate™. We'll work with you during this process, providing recommendations on how to most effectively utilize the vast data fields available in Church Helpmate™ with your existing data.
- Minimal downtime during your transition period to Church Helpmate™. You've just purchased an incredibly useful tool in Church Helpmate™ - but it won't be worth much to you initially if all of your existing data is still in your old system. You certainty don't want to have to re-enter your existing data into Church Helpmate™ (that could take months!). Our typical "turn-around" time for data transfer services is between 1-2 weeks (this is the time from when we receive your existing membership data files until the time we deliver to you your data in a Church Helpmate data file). Not having your existing data loaded in your new Church Helpmate™ program is kind of like moving into a brand new home but leaving behind all of your belongings in the old one.

The Process:

Outlined below are the basic steps involved in getting your data transferred over to Church Helpmate™:

1. This first step is to get your existing data into a file format that we can use with our software tools. Depending on your current system, you may be able to export your existing data to an external text file in one of the industry standard data formats such as Comma Separated Variable (CSV) or tab-delimited. Alternately, we may be able to work with your current system's data files directly. Feel free to contact HTS for more details. Some of the file formats we can handle directly are:
    - Microsoft Access (*.mdb) (all versions)
    - Microsoft Excel (*.xls) (all versions)
    - Microsoft FoxPro (*.dbf or *.dbc) (versions 2.x and 3.0)
    - dBASE (*.dbf) (versions III, III+, IV, and 5)
    - Paradox (*.db) (versions 3.x, 4.x, and 5.0)
    - Lotus 1-2-3 spreadsheets (*.wks, *.wk1, *.wk3, and *.wk4)
    - Delimited text files (files with values separated by commas, tabs, or other characters; must be in MS-DOS or Windows ANSI text format)
    - Fixed-width text files (files with values arranged so that each field has a certain width; must be in MS-DOS or Windows ANSI text format)
2. Once you have your existing data in a format that we can work with (see previous step), you'll need to send us

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these data files. You can either send us these files on disk (via postal mail) or by email (as an email attachment). We do not recommend emailing attachments that are greater than 5MB in file size. If your files are large in size, we strongly recommend utilizing a software "zipping" utility program such as WinZip (www.winzip.com). Programs such as WinZip can greatly reduce the file size of files by compacting them – making them easier to transfer between computers. We can accept your data files via the following:

- 3.5" floppy disk(s) via postal mail
- CD via postal mail
- Iomega's "Zip" disk via postal mail (100MB or 250MB format)
- Email (as a file attachment)

Postal mail shipments should be addressed to: Helpmate Technology Solutions, Attn: Data Transfer, PO Box 619, Union, KY 41091 USA.

Email deliveries should be made to: support@helpmate.net

3. Along with sending us your data files, we'll need to know what major sections (or modules) of your existing data you wish to be transferred into Church Helpmate™. For example, your data files may contain meeting and attendance information, but you may not be interested in transferring this data into Church Helpmate™. Some examples of major sections (modules) are:
   - Basic Household & Individual data (i.e. names, addresses, phone numbers, dates, etc.)
   - Group membership & activity data (i.e. membership information to groups, activities, skills, etc.)
   - Contribution & Pledge data
   - Meetings & Attendance data
4. Once we've received your data files, and the information on which sections of your data you wish to be transferred, we will generate a detailed field-mapping spreadsheet. This spreadsheet (MS Excel file) will show exactly how each data field (i.e. first name, last name, birth date, etc.) from your existing data file(s) will be mapped and transferred to the Church Helpmate™ data file. We will also generate a formal quotation for our services to perform the data transfer.
5. We will deliver to you (via email or postal mail – your preference) a formal quotation for our data transfer services for your review. Keep in mind that you're not obligated to purchase any of our services at this point in the process.
6. You can then contact us for the "go-ahead" (project approval) if you'd like us to proceed with the data transfer project.
7. Once we've been given the "go-ahead", we will enter your project into our schedule.
8. Once we've completed the project, we'll deliver to you a Church Helpmate™ data file populated with your data. Typical turn-around time is between 1-2 weeks from when we receive project approval until we deliver the Church Helpmate™ data file. Delivery options include:
   - 3.5" floppy disk(s) via postal mail
   - CD via postal mail (preferred)
   - Email (as a file attachment)
   - Internet download from our www.helpmate.net web site (we can publish the finished data file into an unpublished section of our web site for your download)

   Upon project completion we will generate an invoice for our services and deliver to you your Church Helpmate™ data file. Invoices are due 30 days from receipt.

What's the Cost?

The cost associated with our data transfer services will depend on several factors:

- Similarity in table and field structure between your existing data files and the Church Helpmate™ structure
- The areas (or sections) of data to be included in the transfer (for example, is contribution or attendance information to be included in transfer?)

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- Total size (record count) of existing data files

For a typical data transfer project handling basic household and individual data (i.e. names, addresses, phone numbers, special dates, etc.), you can expect fees between $130 - $150 (again depending on the above factors). Additional data transfer including group membership/activity, contribution/pledge, and meeting/attendance data would require additional fees.
Once we're able to view first-hand your existing data's table/field design, we will generate a formal quotation which will include firm pricing and expected delivery for your data transfer project.

Questions & Answers:

Q: I read in the Church Helpmate™ 2002 literature that it has a built-in Import Utility to import my existing data. If this is true, why do I need to hire you to handle the data transfer if this functionality is built-into the program?

A: Church Helpmate™ 2002 has the built-in ability to import household and individual information provided that the following are true:

- Your source data file is in Comma Separated Variable (CSV) file format
- Your source CSV data file has its field rows arranged **exactly** as required by the Church Helpmate™ 2002 import routine (see Importing Data for more details).

The import functionality of the Church Helpmate™ 2002 is not able to automatically associate the imported Individual records with their corresponding imported Household records. This assignment (matching Individual records with their Household record) must be done manually for each imported Individual record.

So… the answer to the question is yes, the Church Helpmate™ 2002 program does have the built-in capability to import data from external files. However, depending on your particular situation, you could spend many, many hours just getting your data files into a format that will be usable by the import function of Church Helpmate™. Then, add to that the requirement of manually assigning imported Individual records to their imported Household record, and you can begin to see the overwhelming value in letting us handle the complete data transfer process – from start to finish. We'll take the hassle out of getting your existing data into Church Helpmate™ so that your transition to our software goes as smoothly as possible.

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18.3 CH2002 & Microsoft Access

(Chapter 18 - Advanced Topics)



Church Helpmate 2002 is a Microsoft Access® database application. Why is this important to you? Well, for one, it ensures full Microsoft compatibility with current and future Microsoft operating systems. In addition, this means that the CH2002 data tables which store your church's information can be linked to by any application capable of linking to MS Access databases.

The main portion of the Church Helpmate™ 2002 program consists of 2 files – a "*front-end*" file and a "*back-end*" file. The back-end file is also known as the "data file". The back-end file is the file which stores your church's data (i.e. names, addresses, phone numbers, dates, etc.). The front-end file is the file which contains the design of the program's screens, reports, and underlying source code. For example, the Church Helpmate™ 2002 Individual Detail Form is used to view and enter detailed information about a particular Individual. The form being displayed on the screen is an element of the front-end file, while the actual data displayed is coming from the back-end file. In this way, the front-end file essentially links to and uses the back-end data file.

Both the Church Helpmate™ 2002 front-end and back-end files are Microsoft Access® files (*.mdb). This means that you can "link" to (or attach to) the Church Helpmate™ 2002 back-end data file from any Windows application which is capable of reading an MS Access database source (just as the Church Helpmate™ 2002 front-end MS Access file does). These applications include Microsoft Word®, Microsoft Excel®, Microsoft Access® and various other word processing, spreadsheet and database programs.

For example, you could create a new blank Microsoft Access® database file (using MS Access version 97 or newer) and "link" to the tables of the Church Helpmate™ 2002 back-end data file (MS Access refers to this as "linked tables"). Having done so, you could then go on to create whatever forms, reports, queries, etc. that you wish to create in your database file – all using the data from the Church Helpmate™ 2002 back-end data file! Actually, we provide such a custom front-end MS Access file with the Church Helpmate™ 2002 installation. This database file, named "CustomFrontEnd.mdb", is an MS Access file which has the table links to the Church Helpmate™ 2002 back-end data file already set up and linked to (it will be located on your computer in the folder on your hard-drive where you installed CH2002 – default location is "C:\Program Files\CH2002"). This CustomFrontEnd.mdb database file is completely open for the user to modify as they wish using MS Access (i.e. converting to a specific version of MS Access or adding new forms, new reports, new queries, etc. to use with the CH2002 back-end data). From the Church Helpmate 2002 program's "Tools" menu, you'll find a menu item to open the CustomFrontEnd.mdb file (which enables you to open the CustomFrontEnd.mdb file without leaving the CH2002 program). Many of our customers who are familiar with MS Access really appreciate the ability to link up to the Church Helpmate™ 2002 back-end data file with the CustomFrontEnd.mdb database file – enabling them to tap into the full power of Microsoft Access® with their Church Helpmate™ 2002 data.

TIP: Helpmate Technology Solutions is always ready and willing to implement any customizations you may desire into the CH2002 product. Our programming rates are very competitive and we'd be happy to provide a no-cost, no-obligation programming quote.

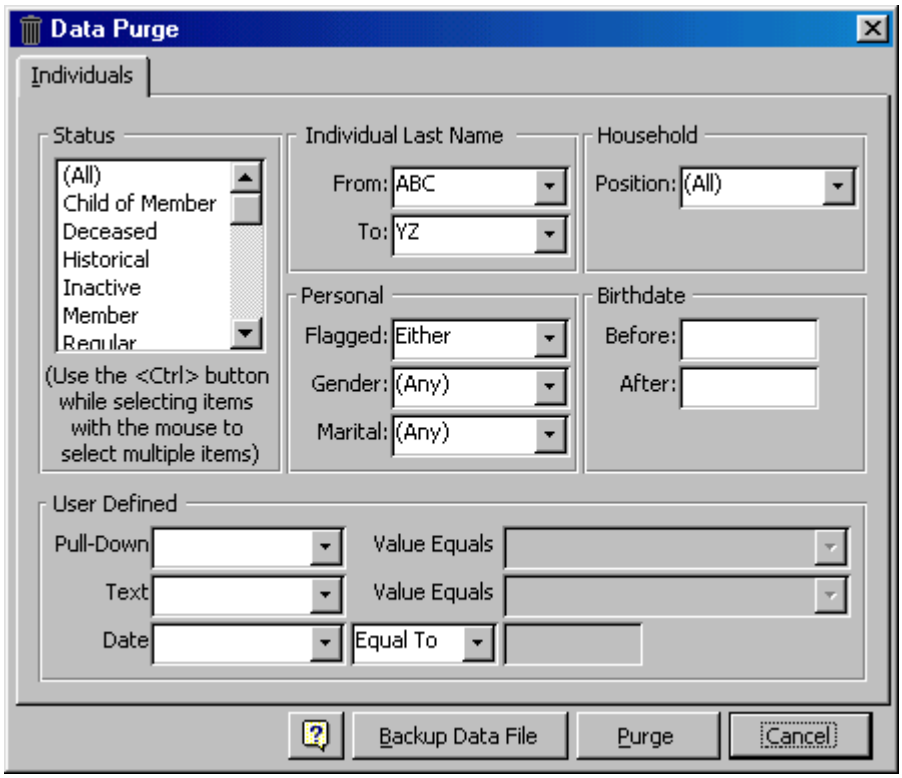
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18.4 Purging Data

(Chapter 18 - Advanced Topics)

CH2002 provides the ability to quickly purge (or delete) data records from the database. You can use this functionality to remove outdated or inactive records such as previous year's Contribution records or Contact records which you no longer associate with.

The screen-shot below is an example of the Data Purge dialog box for purging Individual records.



To open the Data Purge dialog box, select one of the following items from the CH2002 top main menubar:

"Tools | Database Utilities | Purge Household Records"
"Tools | Database Utilities | Purge Individual Records"
"Tools | Database Utilities | Purge Contact Records"
"Tools | Database Utilities | Purge Contribution Records"
"Tools | Database Utilities | Purge Pledge Records"
"Tools | Database Utilities | Purge Meetings & Attendance Records"
"Tools | Database Utilities | Purge Visitation Records"

NOTE: If the CH2002 Security System is enabled, only users with full administrative privileges will be able to use these purging tools.

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Chapter 19

19 Chapter 19 - Upgrading from Previous Version

19.1 Chapter 19 - Upgrading from Previous Version

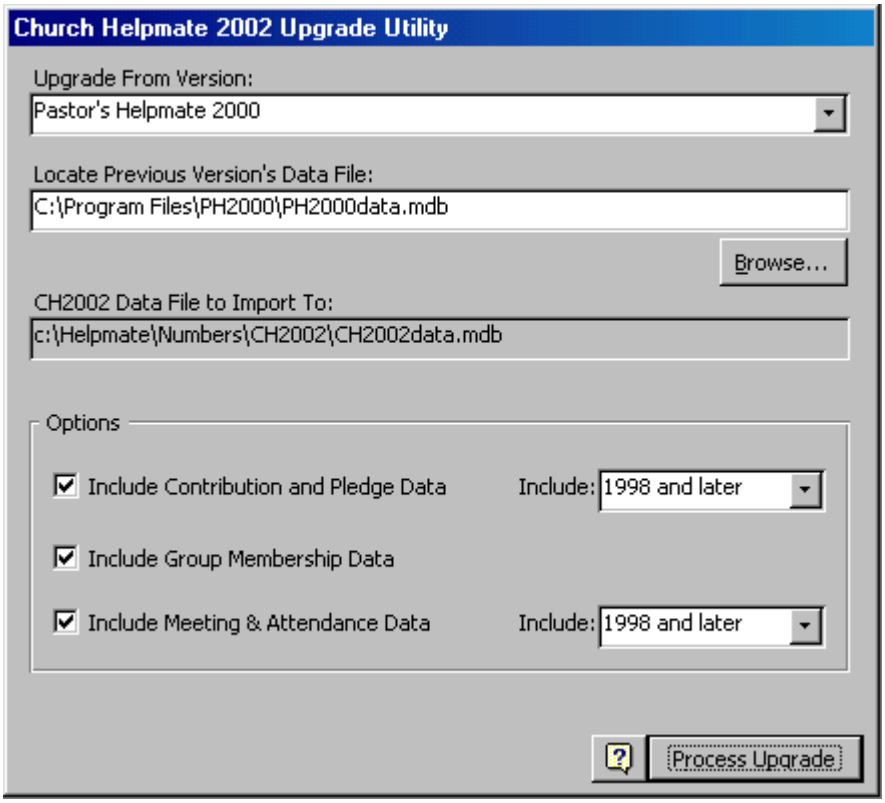
CH2002 provides an Upgrade Utility to import data from previous versions of the product into CH2002. This utility will import into CH2002 the data from the previous version data file that you specify. This Upgrade Utility can be accessed from the CH2002 program group under the Windows "Start" button:

"Start | Programs | Church Helpmate 2002 | Upgrade Utility"

The CH2002 Upgrade Utility can import data files created by the following products/versions:
- Pastor's Helpmate 2000

Data files of products older than Pastor's Helpmate 2000 can be transferred to CH2002, but this requires assistance from Helpmate Technology Solutions. Please contact HTS for more details.

The Upgrade Utility consists of a single form interface which is displayed below:



The steps required to upgrade from a previous version of Pastor's Helpmate are shown below:

1. Install CH2002.
2. Start the CH2002 Upgrade Utility ("Windows Start Button | Programs | Church Helpmate 2002 | Upgrade Utility")
3. From the "Upgrade From Version" pull-down list, select the product you are upgrading from.
4. In the "Locate Previous Version's Data File:" text field, specify the appropriate path and filename (you can use the Browse button to locate this file if you wish).
5. In the Options section of the Upgrade Utility, you'll want to indicate whether or not various optional data should be

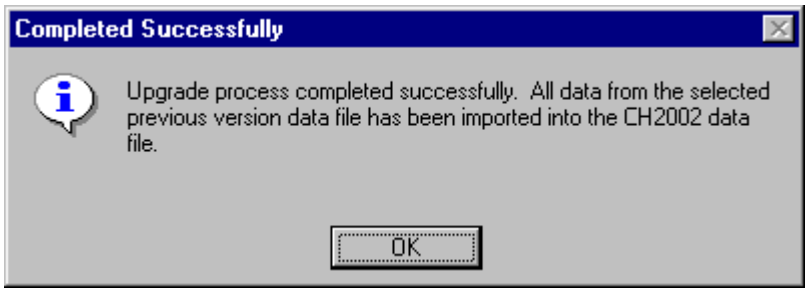
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included in the import process.

6. Click the Import button to begin the import process.
7. Close the Upgrade Utility.

IMPORTANT: The import process may take a significant amount of time to complete depending on the number of records contained in your previous version's data file and the speed of your computer. The import process will take anywhere from a few minutes to run on small data sets to several hours on larger data sets. Unless it is necessary for you to import the previous version's Contribution/Pledge and Meeting/Attendance data, we recommend unchecking these checkboxes from the Upgrade Utility's main screen before clicking the Import button to reduce the time required to complete the upgrade process. During each stage of the process, a status bar meter will be displayed at the bottom of the screen to update you on the process status.

Upon successful import, the following dialog box will be displayed:


Completed Successfully
Upgrade process completed successfully. All data from the selected previous version data file has been imported into the CH2002 data file.
OK

TIP: The previous version's data file is not altered in any way.

TIP: Once you've performed a successful upgrade process, the next time you open the CH2002 program, your previous version's data will now be loaded.

TIP: To reduce the amount of time required for the upgrade process, you can select to only include particular contribution/pledge and meeting/attendance records using the Upgrade Utility's "Include" pull-down lists. For example, instead of including all of your past meeting and attendance records, you could select to include only records from 1999 and later.

TIP: If any errors are encountered during the upgrade process, please contact Helpmate Technology Solutions for assistance.

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